IceWarp Unified Communications

IceWarp Server Outlook Sync User Guide

Version 11

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IceWarp Outlook Sync User Guide

Installation

This chapter lists installation pre-requisites and details step-by-step installation procedure.

Installation Pre-requisites

- Microsoft Outlook must be installed on the machine where you want to install IceWarp Outlook Sync, but it should not be running.

  *NOTE: There are times when MS Outlook appears not to be running but it actually is. You can check it by looking for OUTLOOK.EXE in the Windows Task Manager. If it is listed, shut it down (**End Task**) before you start installation.*

- You should be familiar with MS Outlook.
- If using WIndows XP, you need to have Service Pack 3 installed.
- You should have your account name, password, and server name (hostname) at hand – you will need these to configure your account.
- You should have downloaded the latest version of the IceWarp Outlook Sync from the IceWarp web site or from your local provider of IceWarp Server (e.g. http://mydomain.com/install/) or from the WebClient interface in the **Tools – Licenses/Integration – IceWarp Outlook Sync** section.
- You need to have installed .NET Framework version 3.5.

  Even if you have .NET Framework version 4 installed, you still need to install also version 3.5.

  *If you intend to use the **.msi** installation file format, you do not need to look for .NET Framework as it is a part of the installation package. You will just be asked whether you want to install it.*

- You need ***Activation Key*** for its registration, e-mailed from your administrator or available from the WebClient interface in toolbar: **Tools – Licenses/Integration – IceWarp Outlook Sync** section. This is not necessary when you will use the ***SmartDiscover*** feature within the installation.
- You may be required to insert your original MS Outlook installation media. Make sure that you have your original MS Outlook installation media available before you intend to change your Outlook configuration.
- IceWarp Outlook Sync will only install on systems where the user has administrative rights. The user's rights can be changed to install the IceWarp Outlook Sync and then reset to the original rights.
- Assure, you have sufficient disk space (depending on your email box size) – if you are not sure, ask your server administrator what is adequate.

  For smooth IceWarp Outlook Sync function, it is necessary users to install every important MS Outlook update offered by Microsoft.

Installation Step-by-Step

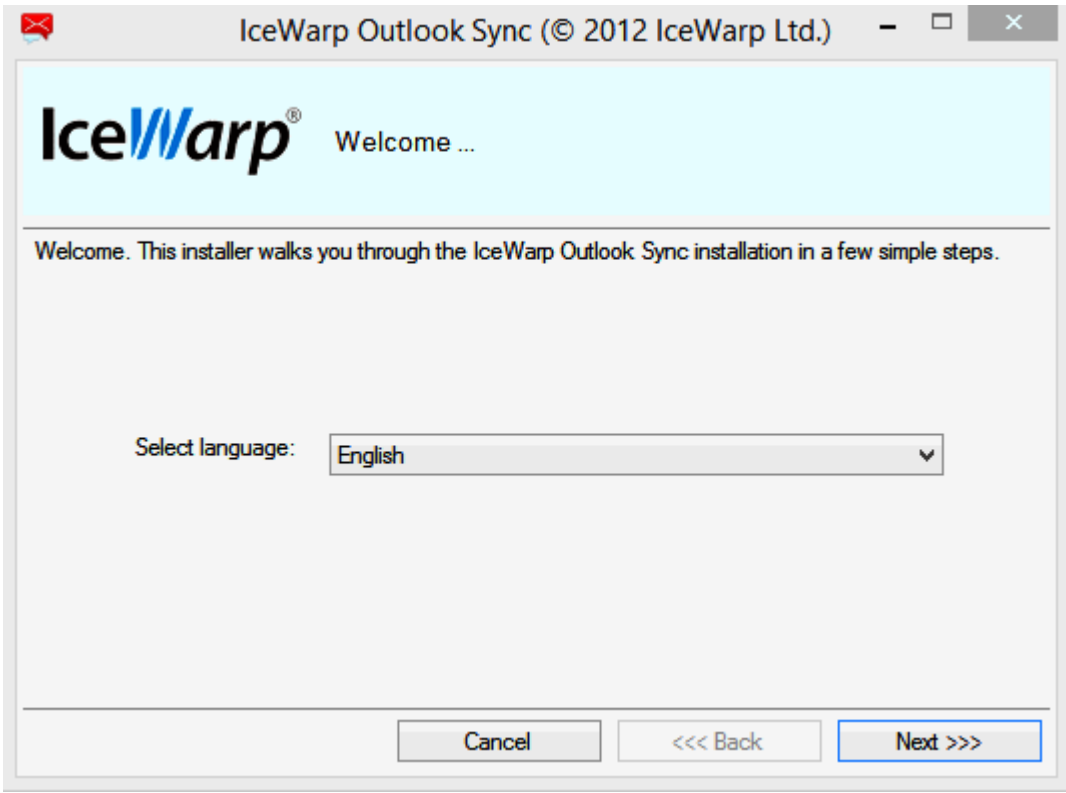
To install IceWarp Outlook Sync successfully, follow these steps:

1. Launch the latest IceWarp Outlook Sync installer. In the case you have any previous version installed, you will be offered to ***Upgrade/Uninstall*** it. Perform upgrade (wizard will guide you).

   *NOTE: There are two types of installation files available. The **.msi** file and **.exe** one. Use the **.exe** file for usual client-based installations and **.msi** one for mass installations launched from a server.*

2. On the **Welcome** page, select the installation and IceWarp Outlook Sync language and click the ***Next*** button.

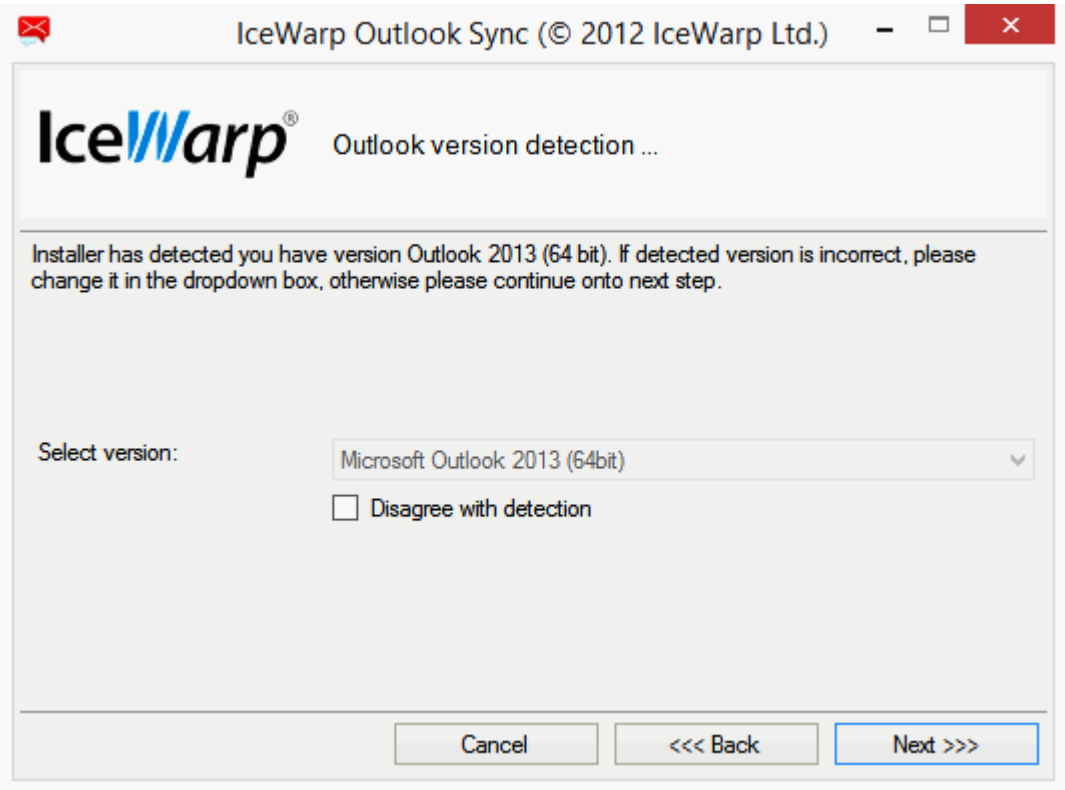
   Figure 1 – Welcome Page



3. On the **Application license** page, tick the ***I accept the license agreement*** box and click ***Next***.

4. On the **Outlook version detection** page, the installer detects the version of MS Outlook you use. In the case the version is not correct, tick the ***Disagree with detection*** box – this will enable the ***Select version*** list – and select the correct one. Click ***Next***. It is highly probable the detected version will be correct.

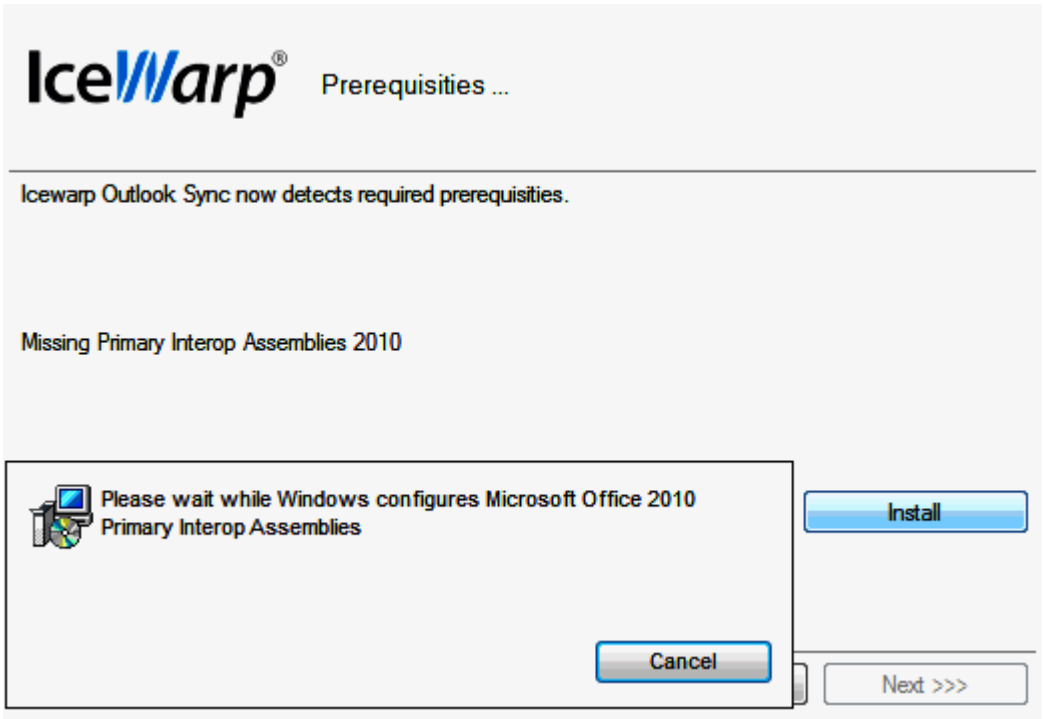
Figure 2 – Outlook Version Detection Page


IceWarp Outlook Sync (© 2012 IceWarp Ltd.)
IceWarp
Outlook version detection ...
Installer has detected you have version Outlook 2013 (64 bit). If detected version is incorrect, please change it in the dropdown box, otherwise please continue onto next step.
Select version:
Microsoft Outlook 2013 (64bit)
Disagree with detection
Cancel
<<< Back
Next >>>

5. In the case the installer detects any required prerequisites missing, their list is shown on the **Prerequisites** page. Click the ***Install*** button. (Message is shown.)

   These prerequisites are included in the installation package – you do not need to look for them anywhere.

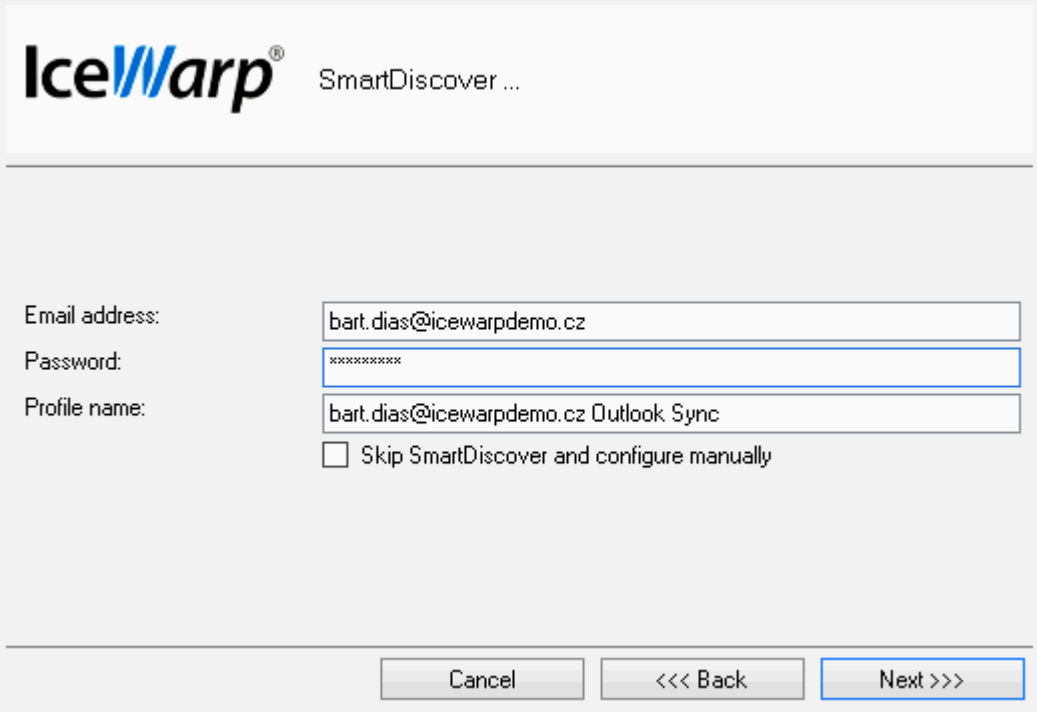
Figure 3 – Prerequisites Page



NOTE: If you already have all items installed, this page is not shown.

6. On the **SmartDiscover** page, decide whether you want to use this feature.

Figure 4 – SmartDiscover Page



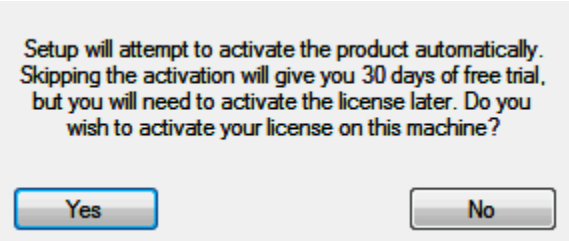
SmartDiscover – YES

i. Fill in the ***Email address, Password*** and ***Profile name*** fields and click ***Next***. The installer will obtain all information needed from the server.

ii. In the next step, the **License activation** dialog is shown. If you have a license for IceWarp Outlook Sync on the server, click ***Yes***. If not or if you want to use IceWarp Outlook Sync within the scope of 30 day trial period first, click ***No***.

You will proceed to the **Outlook Profile** page with its fields filled in. Also fields on the **Incoming Server** and **Outgoing Server** pages will be filled in. Just check that values are correct and click ***Next***.

Figure 5 – License Activation Dialog

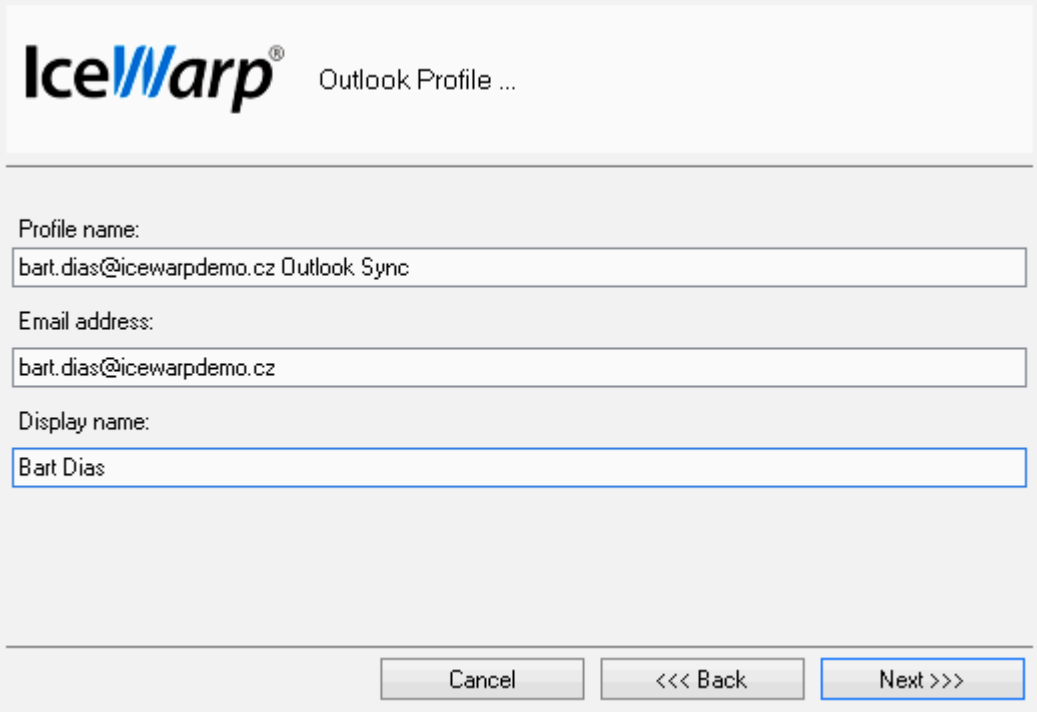

Setup will attempt to activate the product automatically. Skipping the activation will give you 30 days of free trial, but you will need to activate the license later. Do you wish to activate your license on this machine?
Yes
No

SmartDiscover – NO

i. Tick the ***Skip SmartDiscover and continue manually*** box and click ***Next***.

7. On the **Outlook Profile** page, fill in the ***Profile name***, your ***Email address*** and ***Display name*** fields. Click ***Next***.

Figure 6 – Outlook Profile Page



8. On the **Incoming server** page, enter your ***Username***, ***Password*** and email server ***Hostname*** (or IP address).

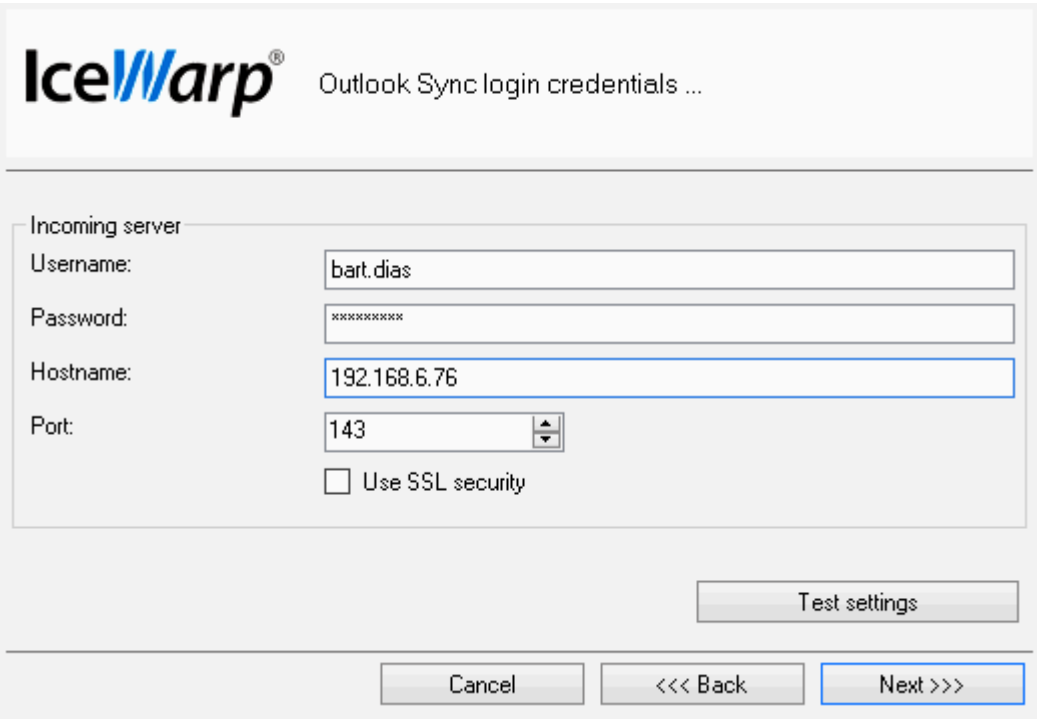
   By default, the ***Port*** number is 143.

   In the case the secured connection is used (https), tick the ***Use secured layer*** box (the ***Port*** number is 993).

   To test the entered values, you can click the ***Test settings*** button. The positive answer is desirable.

   Click ***Next***.

Figure 7 – Incoming Server Page



9. On the **Outgoing server** page, if the same server is used for outgoing emails, tick the ***Use same as incoming*** box. For ***Port*** numbers, see lower.

   In the case of a different server, enter your ***Username***, ***Password*** and email server ***Hostname*** (or IP address).

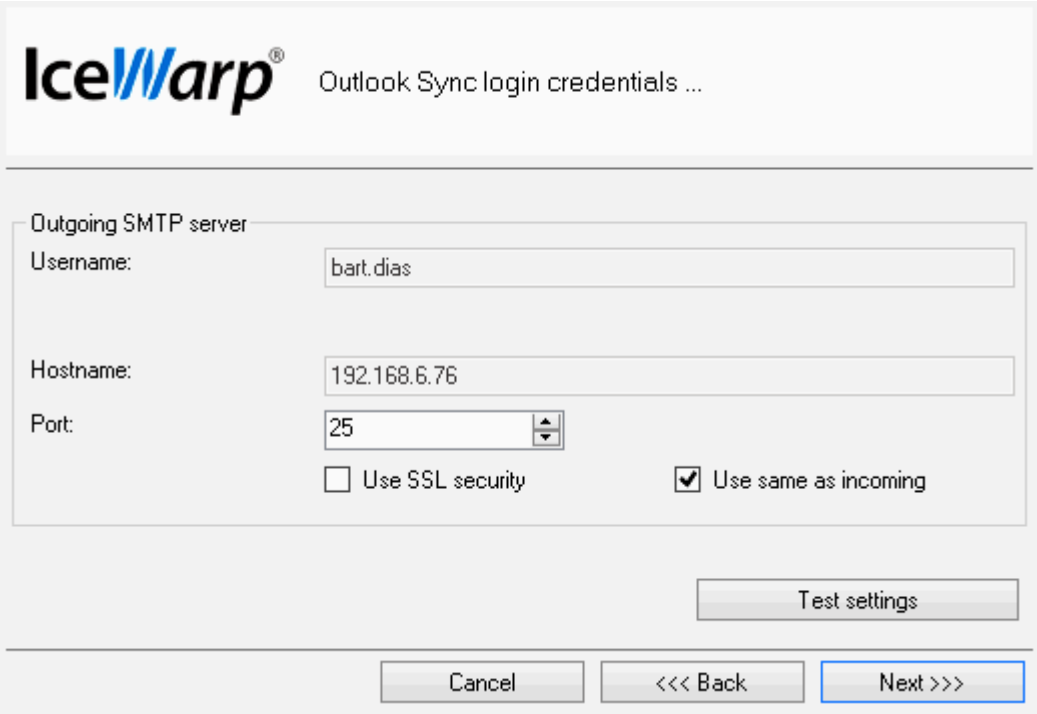
   By default, the ***Port*** number is 25.

In the case the secured connection is used (https), tick the ***Use secured layer*** box (the ***Port*** number is 465).

To test the entered values, you can click the ***Test settings*** button. The positive answer is desirable.

Click ***Next***.

Figure 8 – Outgoing Server Page



10. On the **Select installation folder** page, the default installation folder is shown. If you want to change it, click the ***Select*** button and browse for the wished location. Click ***Next***.

11. On the **Installation in progress** page, wait for the ***Installation finished*** message and click ***Next***.

12. On the **Installation summary** page, click the ***Finish*** button to complete the installation.

Activation

After a successful installation, IceWarp Outlook Sync works in 30 day evaluation mode and will stop working if not activated before the evaluation period expires. To activate your license, have your activation key ready and proceed to the **IceWarp License** chapter for more information.

To check your license validity, select the **Add-Ins** tab **– Settings** button **– License** tab. See the **Settings** chapter – **License** section.

Installation Crossroads

This chapter describes possibilities how to "connect" IceWarp Outlook Sync with an email account and provides links to detailed procedures.

During IceWarp Outlook Sync Installation

This possibility allows you to connect IceWarp Outlook Sync with an existing account during IceWarp Outlook Sync installation. The whole procedure is described in the **Installation Step-by-Step** chapter.

NOTE: This existing account has to be of the IMAP or POP3/IMAP type.

After "No Profile" IceWarp Outlook Sync Installation

Mass or command line installations can be performed as "no profile" ones. It means that IceWarp Outlook Sync is installed but "Sync type" profile is not created. After this installation you can bind IceWarp Outlook Sync with an existing Outlook profile. Find detailed description in the **Bind this Profile with Server Account** chapter.

After Upgrade – Backup Data Import

This method is suitable either after upgrade from any previous "connector/sync" version or when you want to import a backup pst file. Procedures are described in the **Upgrade from Outlook Connector** chapter and **Import of .pst Backup File** one.

Upgrade from Outlook Connector

Actually, a "plain" upgrade is not available. The recommended way is to uninstall MS Outlook Connector, install IceWarp Outlook Sync, and activate the new license using the activation key. The activation key is the same as before, available from IceWarp WebClient or e-mailed from your administrator.

All user's data will be re-downloaded from the server to the new profile.

Follow these steps:

1. Uninstall Outlook Connector via **Control Panel – Programs and Features – Uninstall or change a program**, then install IceWarp Outlook Sync (see the **Installation Step-by-Step** (on page 5) chapter). This will create a new profile. All data then will be re-downloaded from the server to a new **pst** file.
2. To preserve an existing **pst** file, you need to back it up before un-installing (this is rather for someone who never used a Connector or stopped using it). Then run the IceWarp Outlook Sync installer – it will guide you to create a new Outlook profile.
3. If you wish to import data from your existing profile, mind not to name the new IceWarp Outlook Sync profile with the same name as the old one, as the old one would be deleted if names match.

Import of .pst Backup File

You may want to import data from the old MS Outlook profile to the new IceWarp Outlook Sync one using Outlook features for this (**File – Open – Import – Import from another program or file – Outlook Data File (pst)**). During this import, you can select folders that are to be imported – the old ones that do not exist on the server. In the case you will import the whole structure (including currently existing folders), folder items can be duplicated.

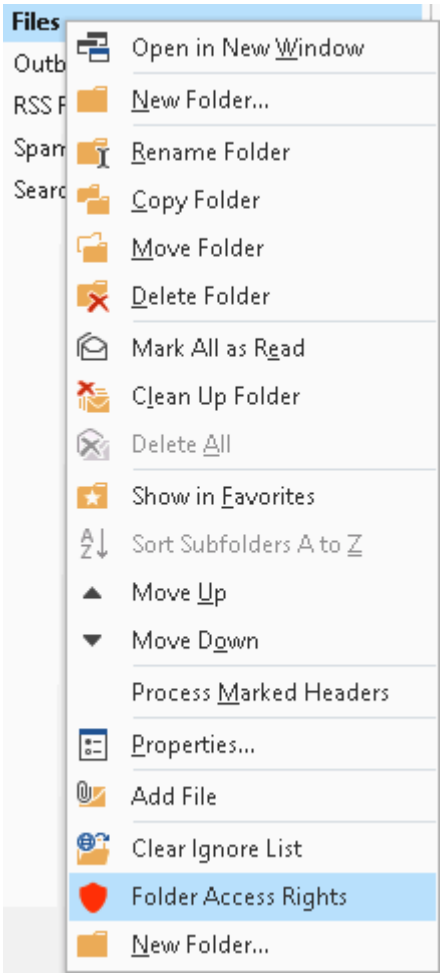
To avoid data duplication it is really easier to give up on importing and just uninstall, create a new profile and let it synchronize all data from the server. Outlook import feature can deal with import duplicities, but it is not sure, it will be 100% successful.

Folder Sharing – Folder Access Rights

You may want to share some of your IceWarp Outlook Sync folders to other users. To do it, follow these steps:

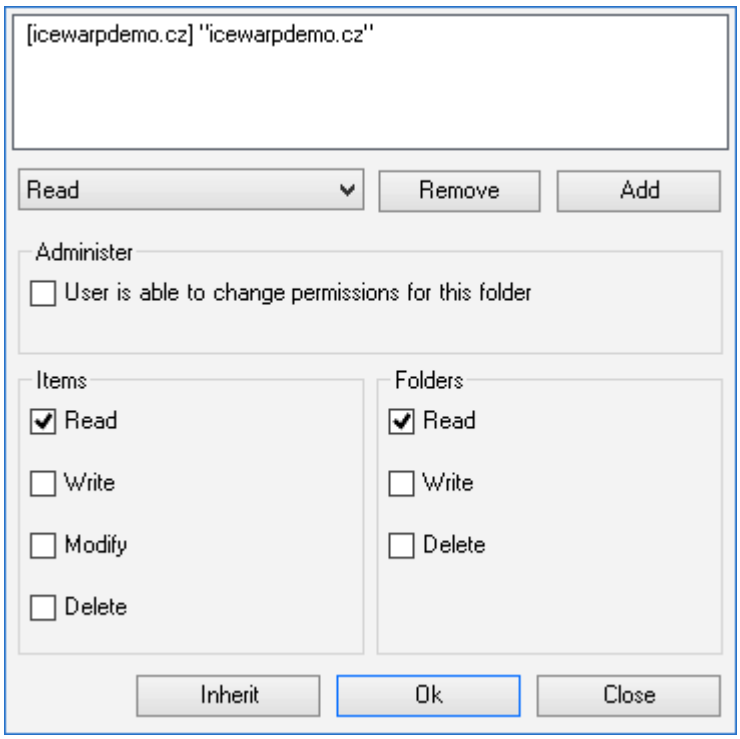
1. In the MS Outlook folder tree, select the folder you want to share, right-click it and select the ***Folder Access Rights*** item.

Figure 1 – Right-click Menu



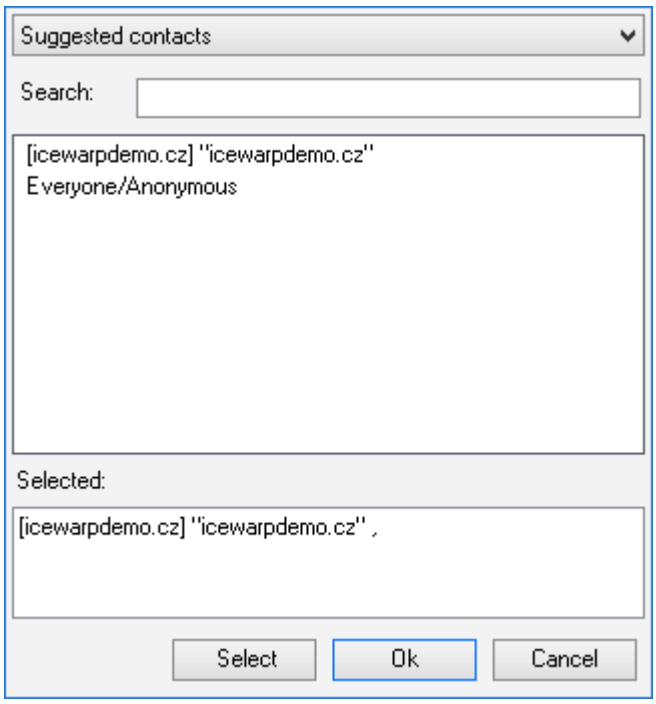
The **Folder Access Rights dialog** opens.

Figure 2 – Folder Access Rights Dialog



2. In the **Folder Access Rights** dialog, click the ***Add*** button. The **Select Users** dialog opens.

Figure 3 – Select Users Dialog



3. In the **Select Users** dialog, highlight a user and click the ***Select*** button to place this user to the ***Selected*** field. Click ***OK***.
4. In the **Folder Access Rights** dialog, select access rights for individual users for both ***Items*** and ***Folders***.

   You can either select a combination from a list (***All, Read, Write, None, Custom***) – in this case, these access rights apply for both ***Items*** and ***Folders*** – or tick the individual check boxes. Click ***OK***.
5. Repeat steps #3 and 4 for other wished users.

*NOTE: You may want to share whole your account. In this case, right-click the account name and select the **Account Access Rights** item. Continue with step #2.*

*NOTE: Do not set any rights for **Anyone** unless you want to grant access to all server users.*

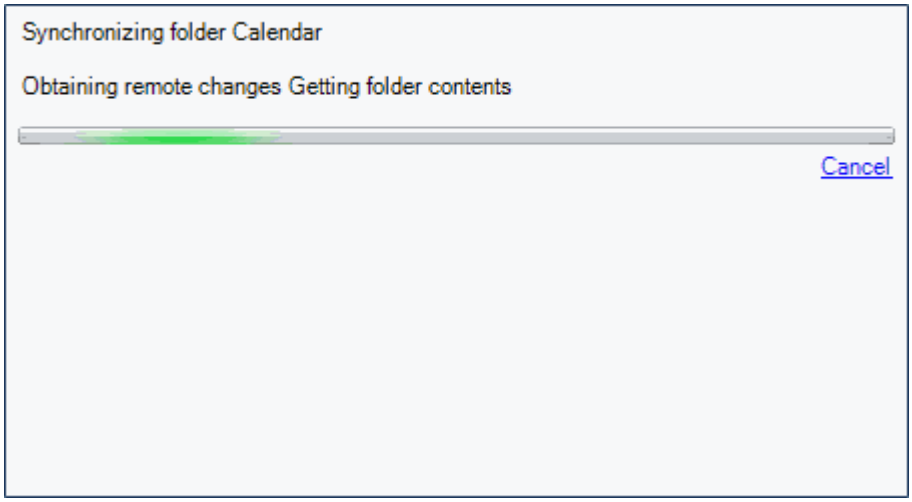
*NOTE: To remove access rights, select a user in the **Folder Access Rights** dialog, click the **Remove** button and click **OK**.*

Access Right	Description (Item/Folder)
Administer	Full rights including the one to change permissions for this folder.
Read	Right to see items in the folder / folder itself respectively.
Write	Right to create/add new items into the folder / create new subfolders respectively.
Delete	Right to delete items included in the folder / delete subfolders respectively.
Modify	Right to modify items in the folder.

Troubleshooting

IceWarp Outlook Sync versus AntiVirus

In some cases, folder synchronization can last minutes. This is caused by an antivirus that checks incoming messages. During this time IceWarp Outlook Sync waits for an IMAP server response. If the situation occurs (it is not too often), you will see a message similar to this one:



Solution

To resolve this problem, disable email checking in your desktop antivirus program. As your IceWarp Server provides this service too, you need not to be afraid of doing this.

You may want to have your outgoing messages checked by your antivirus program because it attaches a short message to them to ensure recipients that messages are safe.

It is possible as outgoing messages check does not cause synchronization delays. You can disable only incoming messages check, provided that your antivirus program supports it.

Missing Installation Prerequisite File(s)

During an Outlook Sync launch, you may obtain an error message announcing that some file (library etc.) is missing. This situation can be caused by incomplete or corrupted update of your operating system (or e. g. Service Pack 3 in the case you are using Windows XP).

Solution

Download the appropriate file and place it to the correct directory. If the problem persists, contact your administrator.

Vista Installation Issue

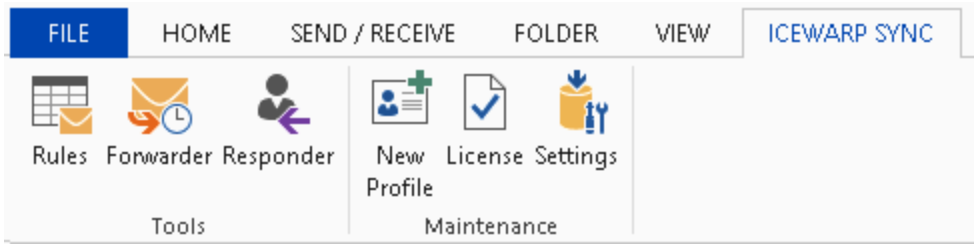
You can obtain the ***Insufficient Rights*** error message when installing IceWarp Outlook Sync under Windows Vista.

Solution

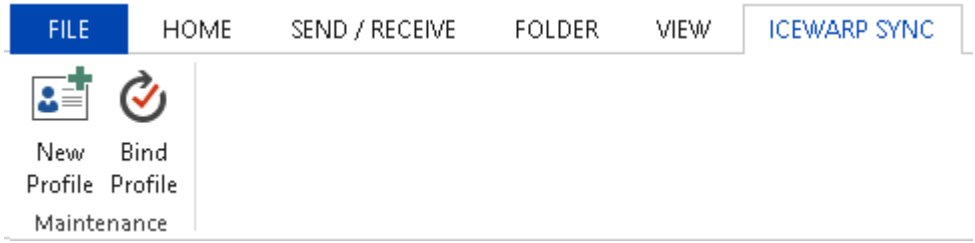
It is necessary to run installation as ***Administrator*** or within an account with administrator permission.

IceWarp Options

After a successful installation, a new tab appears in the main menu of MS Outlook. Its name is **IceWarp Sync**. This is the place where to manage IceWarp Outlook Sync settings.



In the case IceWarp Outlook Sync is not bound with any existing profile, this tab is different:



NOTE: In the case you use MS Outlook 2007, find these options under the **Tools** main menu item.

Profile Manager

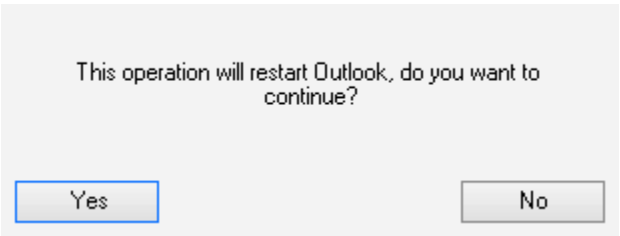
New Profile

Clicking the *New Profile* button allows you to create a new IceWarp Outlook Sync profile using a profile manager. This situation can apply in the case two or more users share one computer, one of them has installed IceWarp Outlook Sync and others have their accounts that have not been bound to any "Connector" or "Sync" type profile.

Follow these steps:

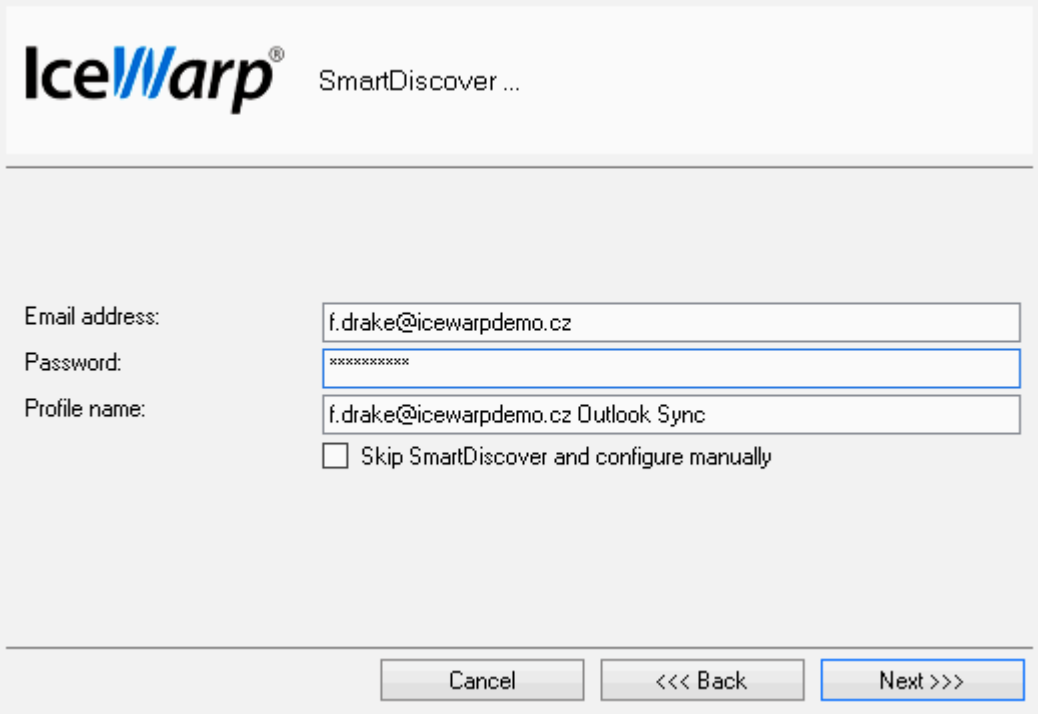
1. Click the button. The **Create new profile** dialog appears. Click the ***Yes*** button.

   Figure 1 – Create New Profile Dialog

2. On the **Create new profile** page, click the ***Next*** button.
3. On the **SmartDiscover** page, decide whether you want to use the SmartDiscover feature.
   - In the case you want to use it, fill in the *Email address, Password* and *Profile name* fields and **DO NOT** tick the *Skip SmartDiscover and configure manually* box. Click *Next*.

     Figure 2 – SmartDiscover Page

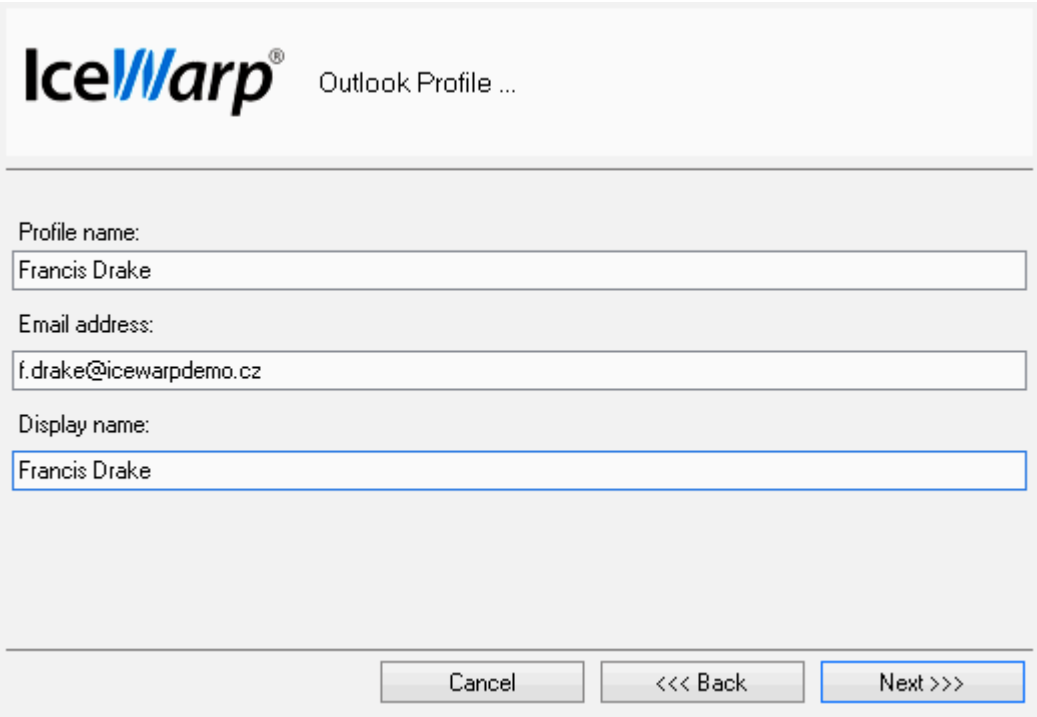


In the next step, select whether you want to activate license or use a trial version up to 30 days. On the next page, click the *Finish* button.

- In the case you do not want to use SmartDiscover feature, tick the *Skip SmartDiscover and configure manually* box and click *Next*. You will proceed to the **Outlook Profile** page.

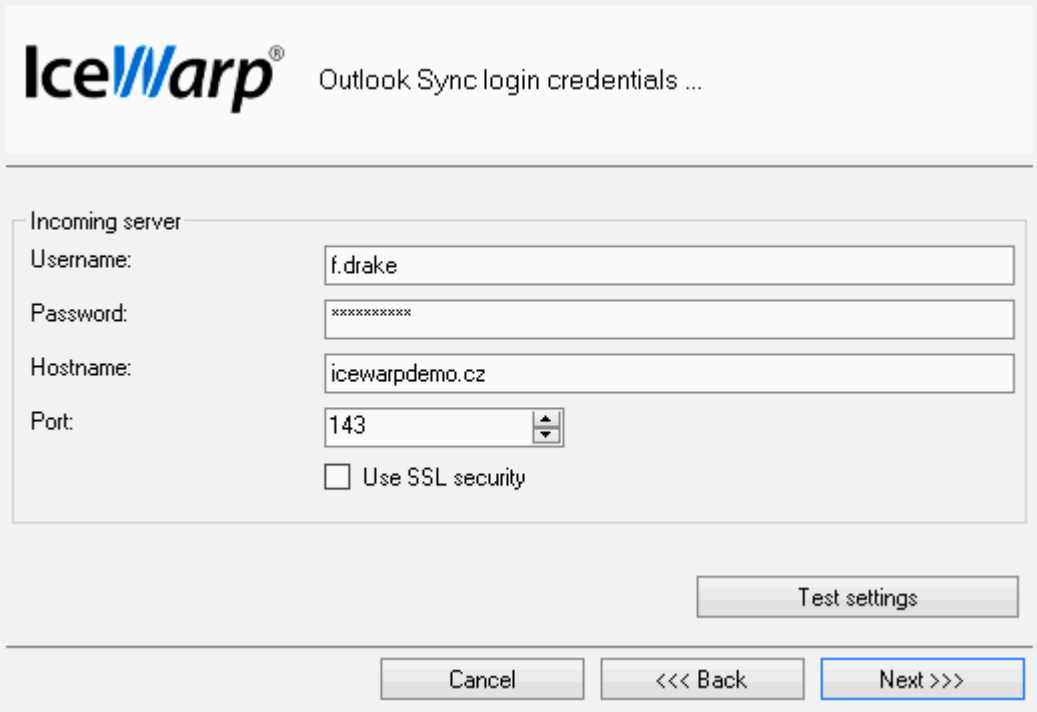
4. On the **Outlook Profile** page, fill in the ***Profile name, Email address*** and ***Display name*** fields. Click the ***Next*** button.

Figure 3 – Outlook Profile Page



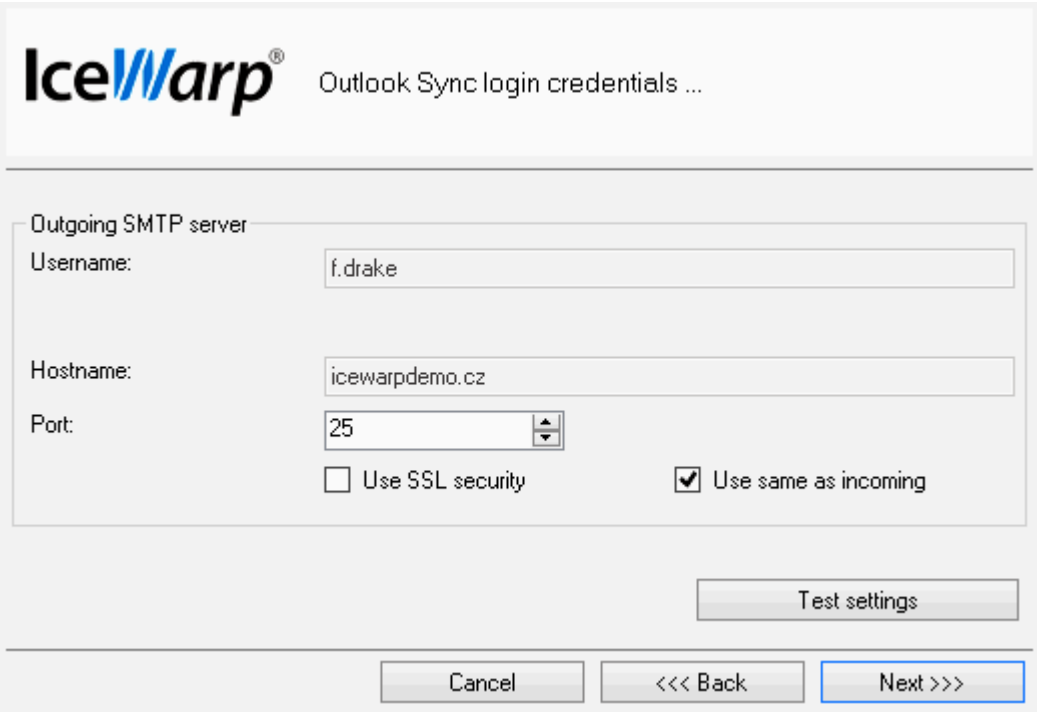
5. On the **Outlook Sync login credentials – Incoming server** page, fill in your ***Username, Password***, server ***Hostname*** and ***Port***. For more information about server settings and the ***Use SSL security*** check box, refer to the **Installation Step-by-Step** chapter – step # 7. Click the ***Next*** button.

Figure 4 – Incoming Server Page



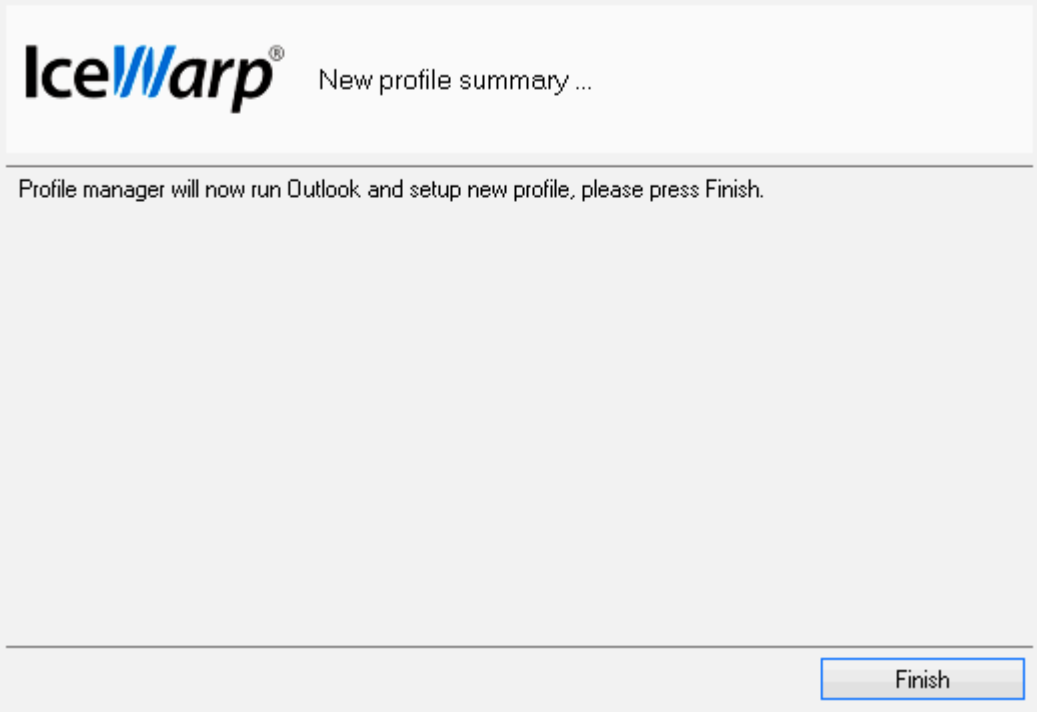
6. On the **Outlook Sync login credentials – Outgoing server** page, tick the ***Use same as incoming*** box (if the same server is used for outgoing emails) or fill in your ***Username, Password***, server ***Hostname*** and ***Port***. For more information about server settings and the ***Use SSL security*** check box, refer to the **Installation Step-by-Step** chapter – step # 8. Click the ***Next*** button.

Figure 5 – Outgoing Server Page



7. On the **New profile summary** page, click the ***Finish*** button.

Figure 6 – New Profile Summary Page



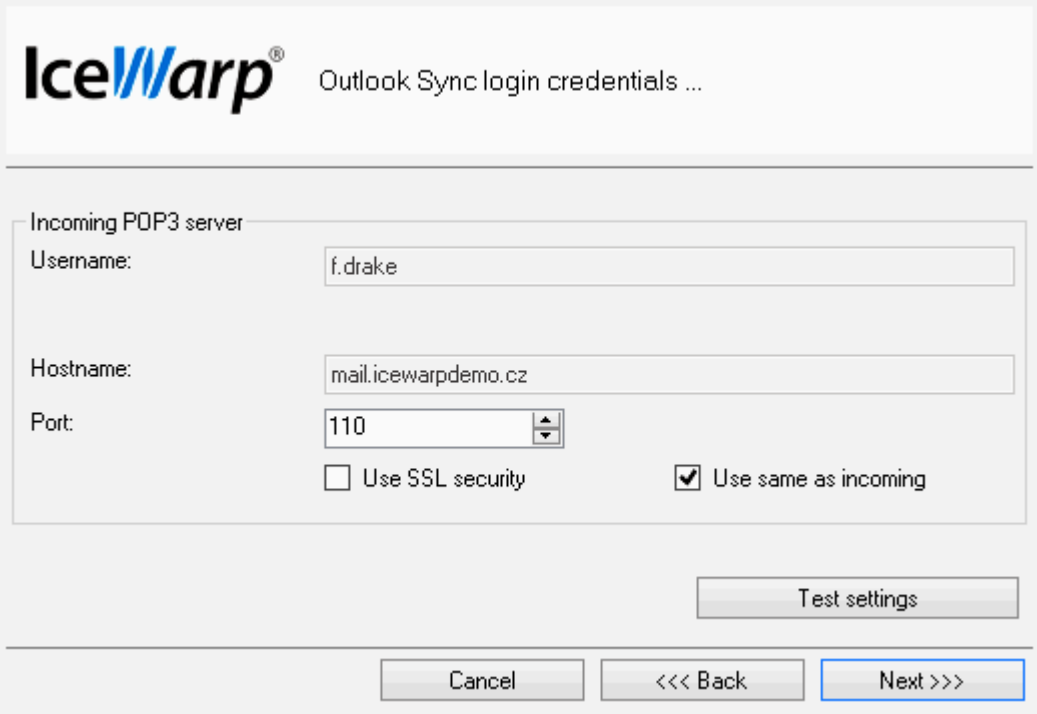
GroupWare Only Profile

Usually, the IceWarp Outlook Sync profile is created as the IMAP one. But, you may want to download your email messages to your computer (email client).

This feature – GroupWare only profile – allows you to create a POP3 profile combined with synchronization of your groupware items.

To create this profile combination, follow these steps:

1. Use the *Profile Manager GroupWare Only* link (***Windows 8 – Applications*** screen).
2. Follow the steps # 2 to 6 of the previous procedure.
3. On the **Incoming POP3 server** page, review the shown information. (In the case your outgoing POP3 mail server differs from the incoming one, untick the *Use same as incoming* box. The **Outgoing POP3 server** page is shown – it is very similar to the page shown at the step # 6 of the previous procedure.)



Click *Next*.

4. On the **New profile summary** page, click the *Finish* button.

IceWarp License

Clicking this button reveals the **License** dialog. On the **License** tab (see the **Activation** chapter), you can check your license validity. If it reads ***License subscription expires on ...*** with some date in near future, you need to activate your license.

Two other tabs let you activate your license either online or offline.

Online Activation

To activate your license online, follow these steps:

1. Obtain your activation key from your administrator.

   Another way is to get it via IceWarp WebClient: Within the **Communication Bar – Options** dialog, select the **Licenses** tab – *Outlook Sync* item. From the *Product Activation Key* field, copy your activation key.

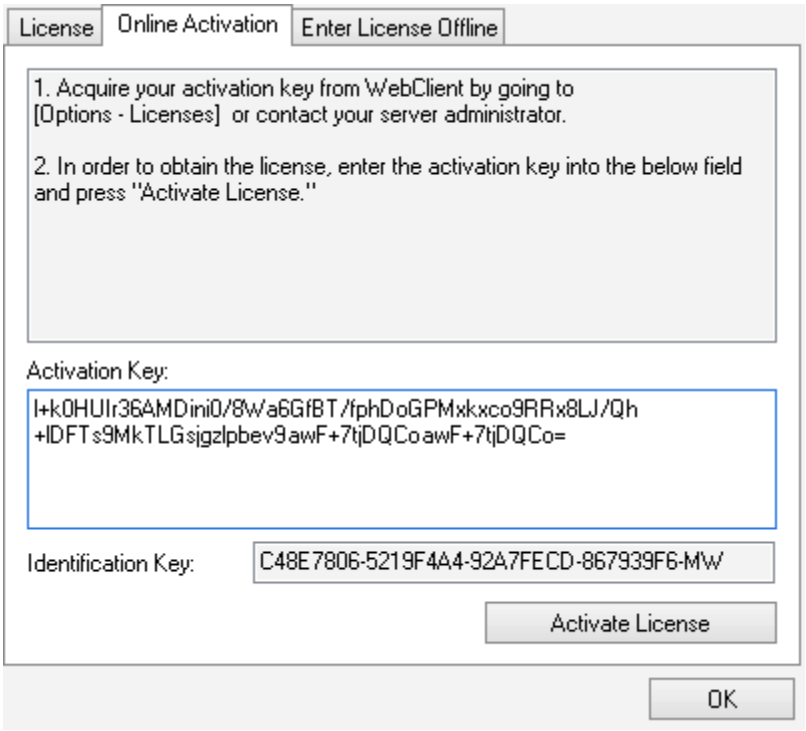
   Figure 1 – IceWarp WebClient – Options – Licenses

2. Within the **MS Outlook – IceWarp Sync** tab – **License** dialog, select the **Online Activation** tab.

Paste your activation key into the *Activation Key* field.

Click the **Activate License** button. The button will only be active if you enter a correctly formatted activation key.

Figure 2 – License Dialog – Online Activation Tab


License
Online Activation
Enter License Offline
1. Acquire your activation key from WebClient by going to [Options - Licenses] or contact your server administrator.
2. In order to obtain the license, enter the activation key into the below field and press "Activate License."
Activation Key:
I+k0HUIr36AMDini0/8Wa6GfBT/fphDoGPMxkxco9RRx8LJ/Qh
+IDFTs9MkTLGsjgzlpbev9awF+7tjDQCoawF+7tjDQCo=
Identification Key:
C48E7806-5219F4A4-92A7FECD-867939F6-MW
Activate License
OK

Click ***OK*** to finish activation.

3. An error message is shown in the case the activation failed.

   License registration may fail for the following reasons:

   • The activation key is expired – obtain a new one and repeat the registration.

   • The computer is blocked from accessing the Internet or access to the licensing server is temporarily unavailable.

   • The number of client licenses has been exceeded for your organization. IceWarp licensing servers track how many systems have been activated using a given license. If the number of activated clients exceeds the total for the license, IceWarp Outlook Sync will inform you that additional licenses need to be purchased.

   • If you need to re-install IceWarp Outlook Sync software on a new system due to either hardware failure or system upgrade, contact your support staff to assist you with removing the existing IceWarp Outlook Sync registration, or request a new activation key.

Offline Activation

To activate your license offline, follow these steps:

1. To register IceWarp Outlook Sync off-line (because your computer cannot access the license server), you need to obtain the ***license.xml*** file from IceWarp website.

   Go to http://www.icewarp.com/purchase/, click the ***Lic. Maintenance*** button and in the **Client License Activation** section, click the ***Activate License*** button.

2. Copy the content of the ***Identification Key*** field (**License dialog – Online Activation tab** (see the above figure)) and paste it into the web page field of the same name.

   Copy your activation key and paste it into the ***Activation Key*** web page field.

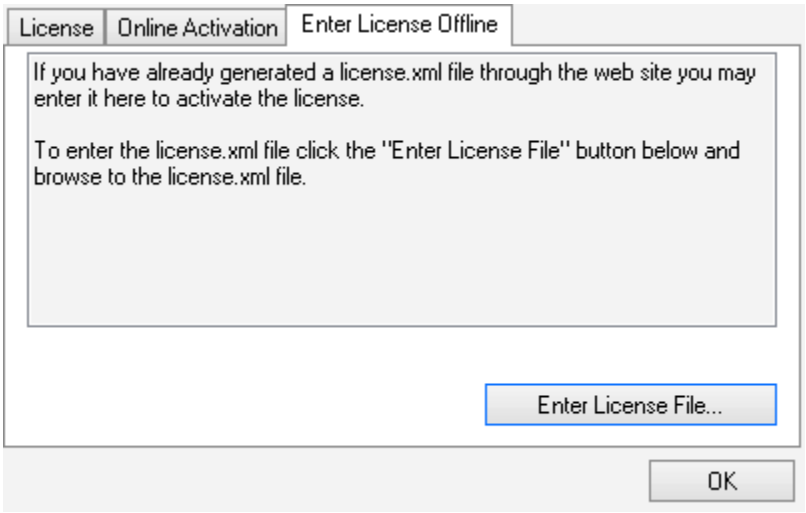
   Click the ***Next*** button.

3. On the next page, click the link to download your **license.xml** file and save it into the wished directory.

4. In the IceWarp Outlook Sync **License** dialog – **Enter License Offline** tab, click the ***Enter License File*** button.

Browse for the **license.xml** file and click ***Open***.

Figure 3 – Entering license.xml File


License
Online Activation
Enter License Offline
If you have already generated a license.xml file through the web site you may enter it here to activate the license.
To enter the license.xml file click the "Enter License File" button below and browse to the license.xml file.
Enter License File...
OK

Click ***OK*** to finish activation.

If you are unable to register the IceWarp Outlook Sync, contact your support helpdesk or IT administrator, please.

Synchronize

Within the ***Home*** tab, click this button to synchronize items in the selected folder immediately.

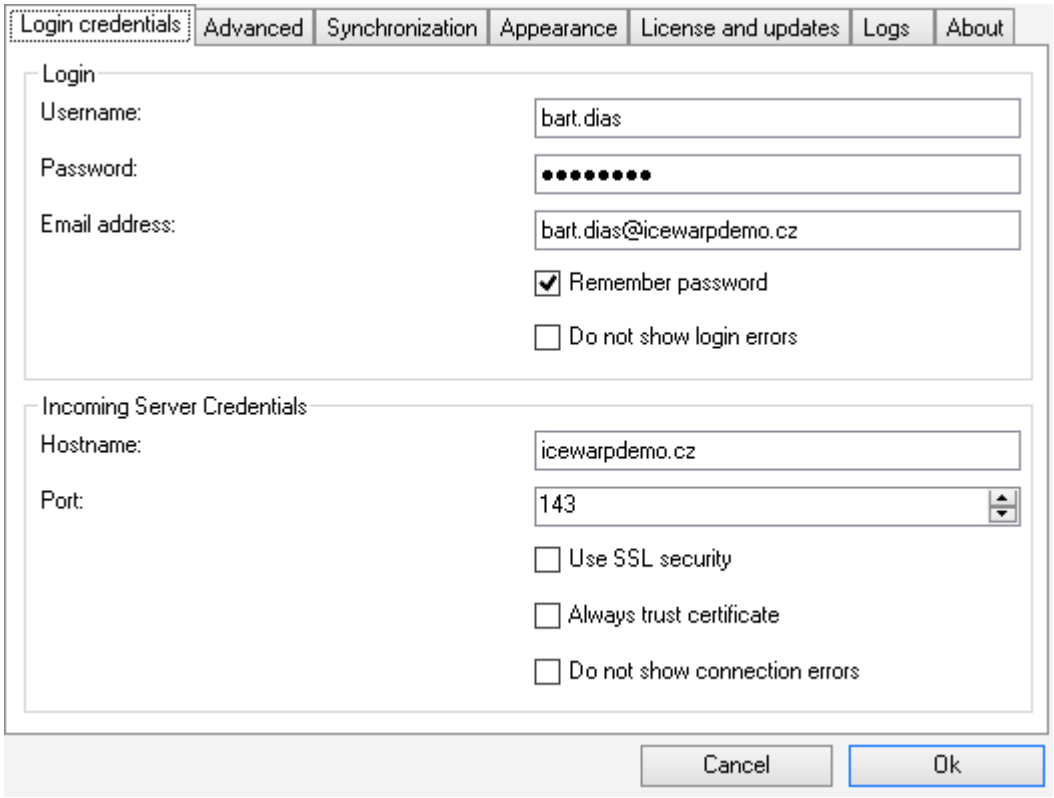
Folder Sync

Within the ***Home*** tab, click the button to synchronize whole folder structure (added or deleted folders) immediately.

Settings

Login Credentials

This tab allows you to manage your login to a server and connection with it.

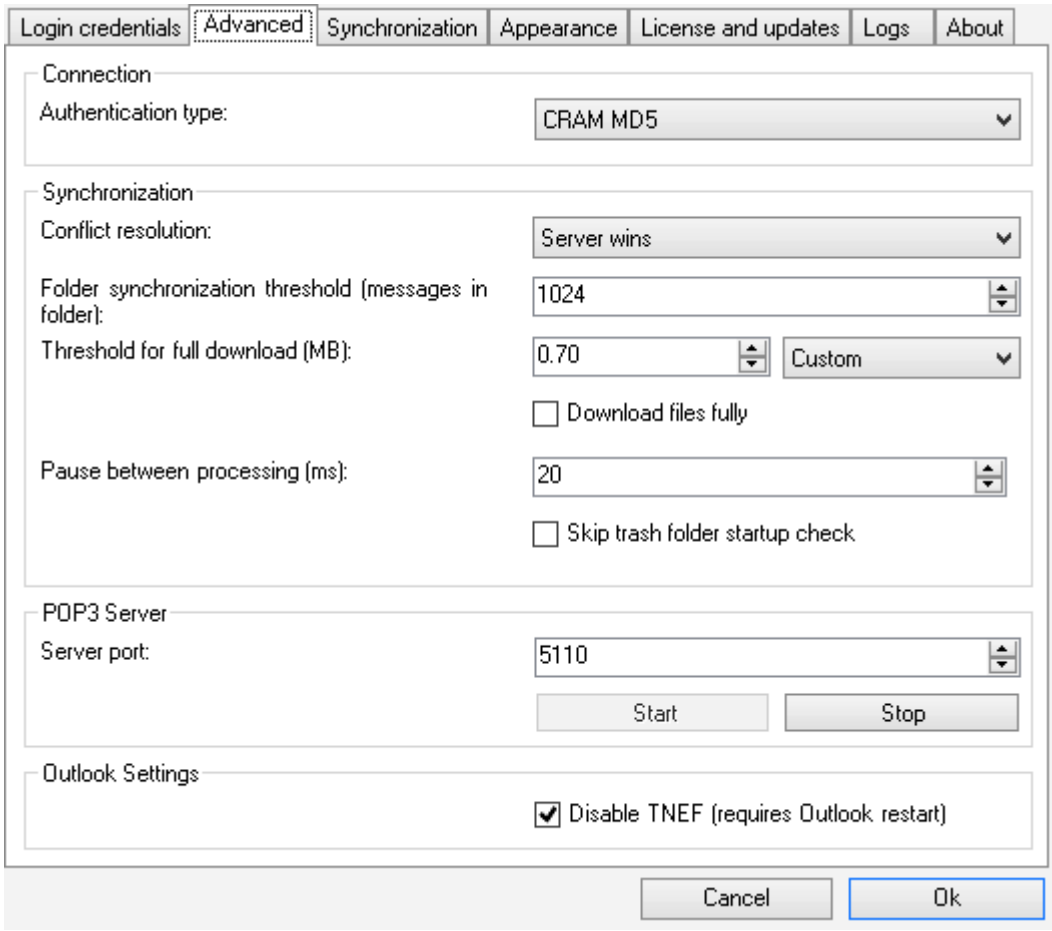


Field	Description
Username	Enter your username for your mail server. It is filled in during installation.
Password	Enter your password for your mail server. It is filled in during installation. If changed after installation, change it also here.
Email address	Enter your email address. It is filled in during installation.
Remember password	Tick the box if you do not want to be asked for your password always when you launch IceWarp Outlook Sync.
Do not show login errors	Tick the box if you do not want to have shown messages in the case, IceWarp Outlook Sync cannot login to the server.
Hostname	Enter the hostname of your mail server.
Port	The default port number for IMAP service is 143.
Use secured connection	Tick this box if you use secured connection (https) to your mail server. In this case, the port number selected in the ***Port*** field is different (by default, it is 993).
Always trust certificate	If this box is ticked, every server certificate is trusted, no validation fails when secure connection is used (IMAP or WebDAV).

Do not show connection errors	Tick the box if you do not want to have shown messages in the case, IceWarp Outlook Sync cannot connect the server.

Advanced

This tab allows you to manage advanced settings. Usually it is not necessary to change default values. If in doubt, consult with your administrator.

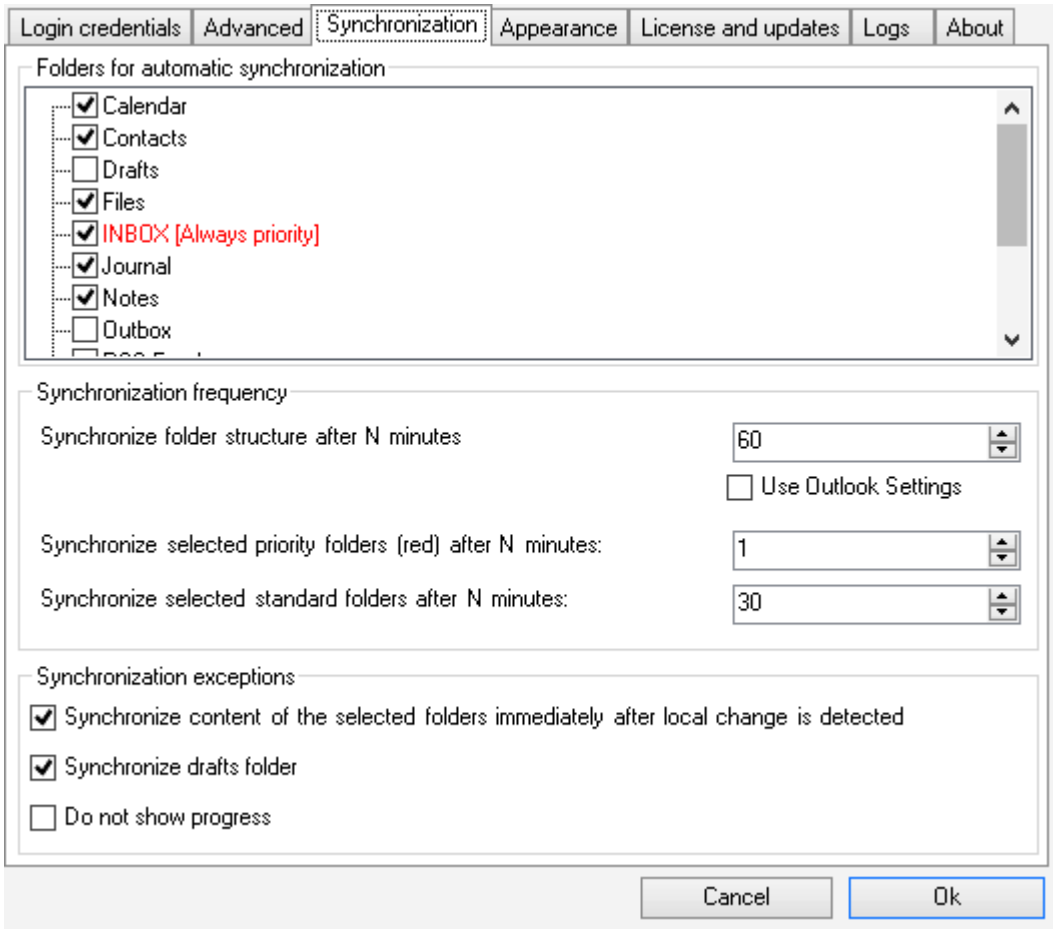


Field	Description
Authentication type	Select authentication type you want to use: ▪ **Cram MD5** – server sends a string, credentials to be encrypted with by a client. Encrypted credentials are sent to the server. It encrypts saved credentials with the same string and compares results. ▪ **Plain** – no encryption (or base64) is used.
Conflict resolution	It is possible to access a server using two (or even more) clients in the same time. When some item (contact, event, etc.) is changed from one client, and changed to a different value from the other one, the solution can be: ▪ **Server wins** – the data on the server are used in the case of conflict. ▪ **Client wins** – the last data change wins in the case of conflict.
Full synchronization threshold	Up to this number of emails, these items are parsed and synchronized. When number of emails exceeds this number, synchronization is based on Outlook information about items that need to be

	synchronized (i. e. have been changed). If there are many messages, Outlook Sync does not loop over all messages but deals with a change report provided by Outlook. Because Outlook sometimes does not inform about the changes, 100% functionality is guaranteed only if we loop over all emails. It is not recommended to set this value to much higher than **1024** because the processing is then very CPU consuming.
Threshold for full download (MB)	Up to this email size (in megabytes), whole emails are downloaded. When email size exceeds this number, only email headers are downloaded. Whole emails are downloaded in the moment they are clicked (to open them). This field is enabled only when the ***Custom*** option (see lower) is selected.
Custom	Select one of the following: ▪ **Custom** – this option lets you to specify the ***Threshold for full download*** feature. ▪ **Headers** – only email headers will be fully downloaded. ▪ **Full** – all emails will be fully downloaded.
Download files fully	This feature is related to file type folders only. If the box is ticked, files are downloaded fully regardless of the download threshold set above.
Pause between processing (ms)	Specify a pause between processing of single items. Very advanced feature – do not set to 0 (zero).
Server port	Specify the port POP3 server to listen on. For more information about POP3 server, refer to the **Advanced IceWarp Outlook Sync Background** chapter.
Start/Stop	Click the buttons to start/stop this POP3 server. Do not do stop the server unless you exactly know what you want to do. For more information about POP3 server, refer to the **Advanced IceWarp Outlook Sync Background** chapter.
Disable TNEF (requires Outlook restart)	In the case you forward emails with HTML formating and recipients complain they receive the **winmail.dat** file (it includes HTML formating) or weirdly looking messages, tick this box to disable creating of this file – this solves the problem. *NOTE: It is necessary to restart Outlook to apply.*

Synchronization

This tab allows you to manage folder synchronization.

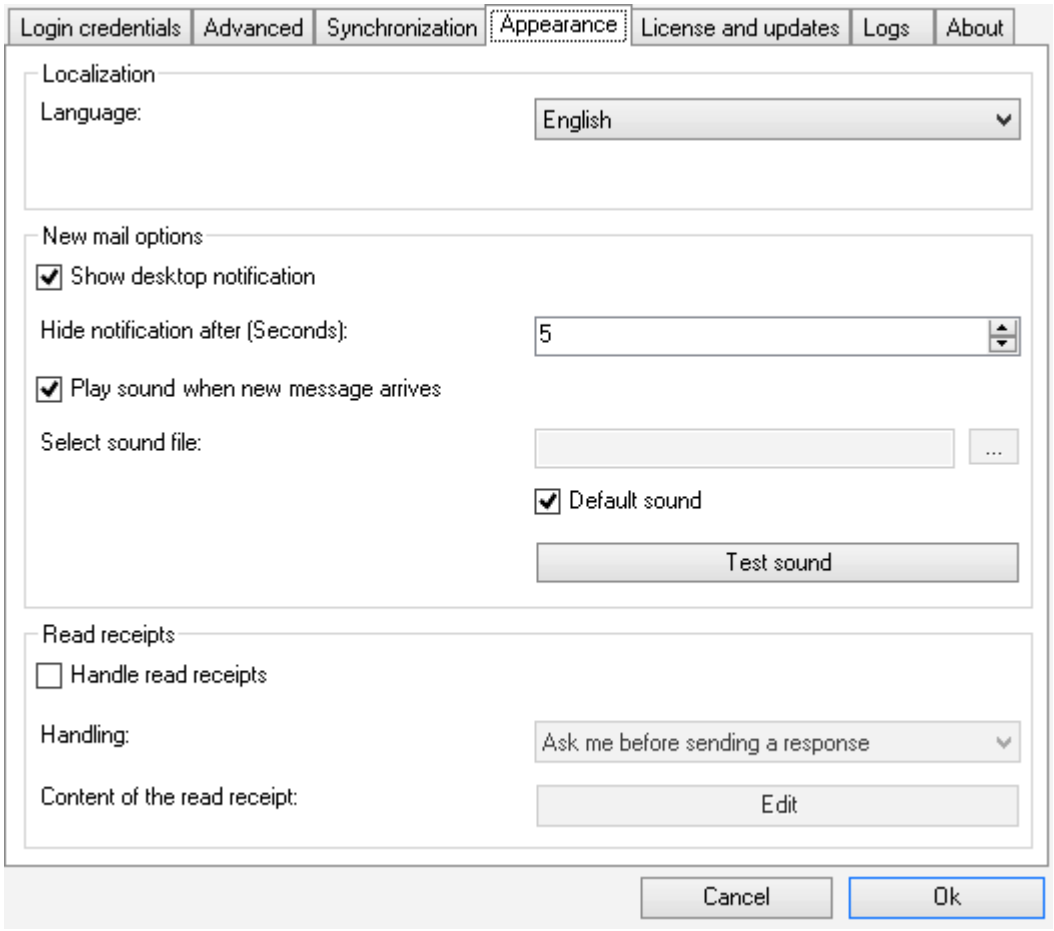


Field	**Description**
Folders for automatic synchronization	Tick folders that you want to have synchronized automatically. Other folders are synchronized when entered or when you select a manual synchronization (the ***Synchronize*** button).
Synchronize folder structure after N minutes	Select time in minutes. Folder structure (added or deleted folders) will be synchronized in this interval.
Use Outlook Settings	Tick this box if you want to use synchronization settings as set for the original Outlook POP3 account.
Synchronize selected priority folders after N minutes	Select time in minutes. Priority folders will be synchronized in this interval. By default, it is one minute. NOTE: To set a folder as a priority one, right-click it in the *Folders for automatic synchronization* list and select the *Priority sync* item. Priority folders are marked red.
Synchronize selected standard folders after N minutes	Select time in minutes. Standard folders will be synchronized in this interval. By default, it is 30 minutes.
Synchronize content of the selected folders immediately after local change is	Tick the box if you want to have selected folders synchronized immediately after performing (and saving) any change – e. g. after creating a new contact, event,

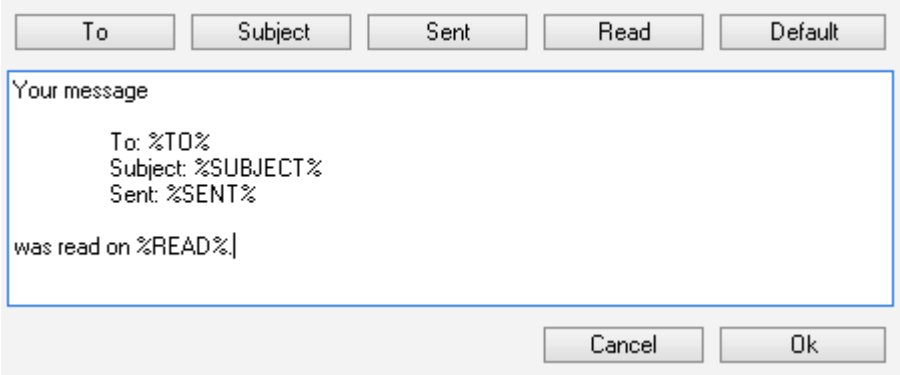
detected	etc.
Synchronize Drafts folder	Tick the box if you want to have synchronized also the ***Drafts*** folder.
Do not show progress	Tick the box if you do not want to have synchronization progress displayed.

Appearance

This tab allows you to select the IceWarp Outlook Sync language, as well as set new emails notifications.

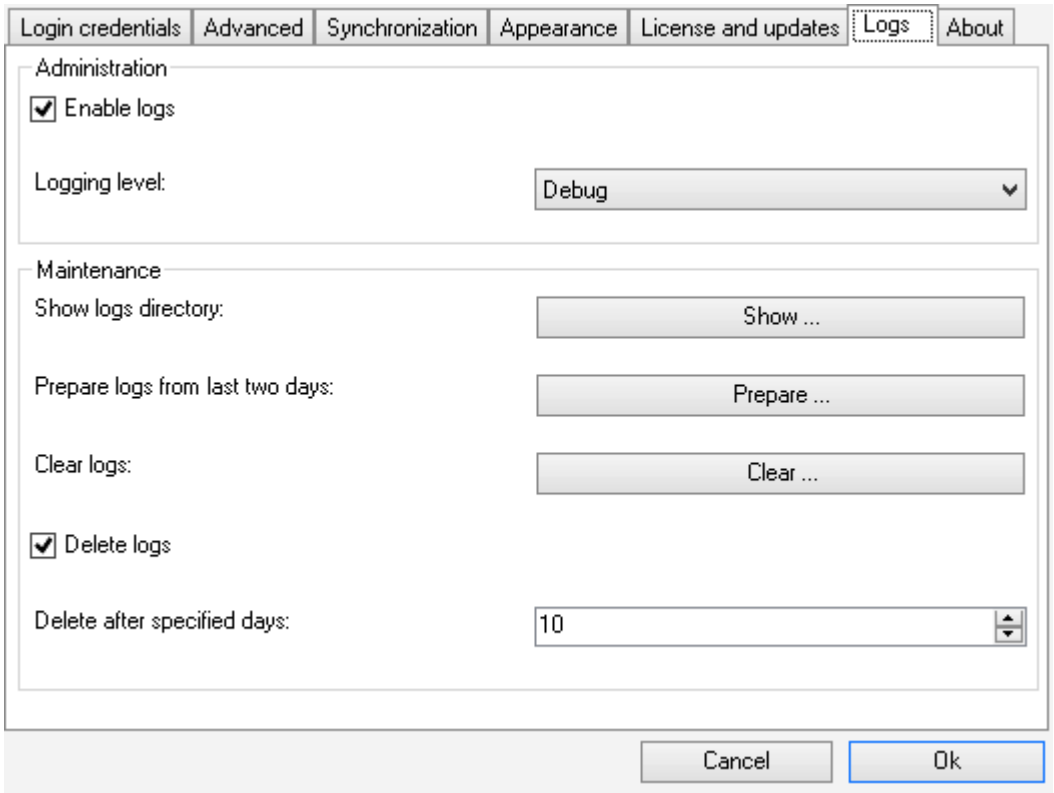


Field	**Description**
Language	Select a wished language from the list.
Show desktop notification	Tick the box if you want to have shown notifications of incoming messages.
Delay before close (seconds)	Set how long time is this notification to be shown.
Play sound when new message arrives	Tick the box if you want to be notified by playing sound.
Select sound file	You may want to have another sound played. Use the "..." button to browse for the appropriate file. It should be of the **.wav** format. The adequate sound length is 1 – 1.5 second.

Default sound	Tick the box in the case you want to have the default sound played.
Test sound	Click the button if you want to test the sound you have selected.
Read receipts	Tick the box if you want to have handling of the read receipts active.
Handle read receipts	Select a mode from the list: ▪ *Ask me before sending a response* – after reading an email message, you will be asked whether a read confirmation should be sent (in the case a message sender has requested it). ▪ *Always send a response* – a read confirmation will be sent automatically (in the case a message sender has requested it). ▪ *Never send a response* – a read confirmation will not be sent at all.
Content of the read receipt	Click the ***Edit*** button to change read receipt text. Simple editor opens.  You can use variables here, click the appropriate button(s) to enter them into the text. ▪ *%TO%* – extracts a recipient from the original message (your name or email address in this case) and uses it on the appropriate place. ▪ *%SUBJECT%* – extracts a subject from the original message and uses it on the appropriate place. ▪ *%SENT%* – shows the time (date) when the original message was sent. ▪ *%READ%* – shows the time (date) when the original message was read. Click the *Default* button for return to the original (default) text.

Logs

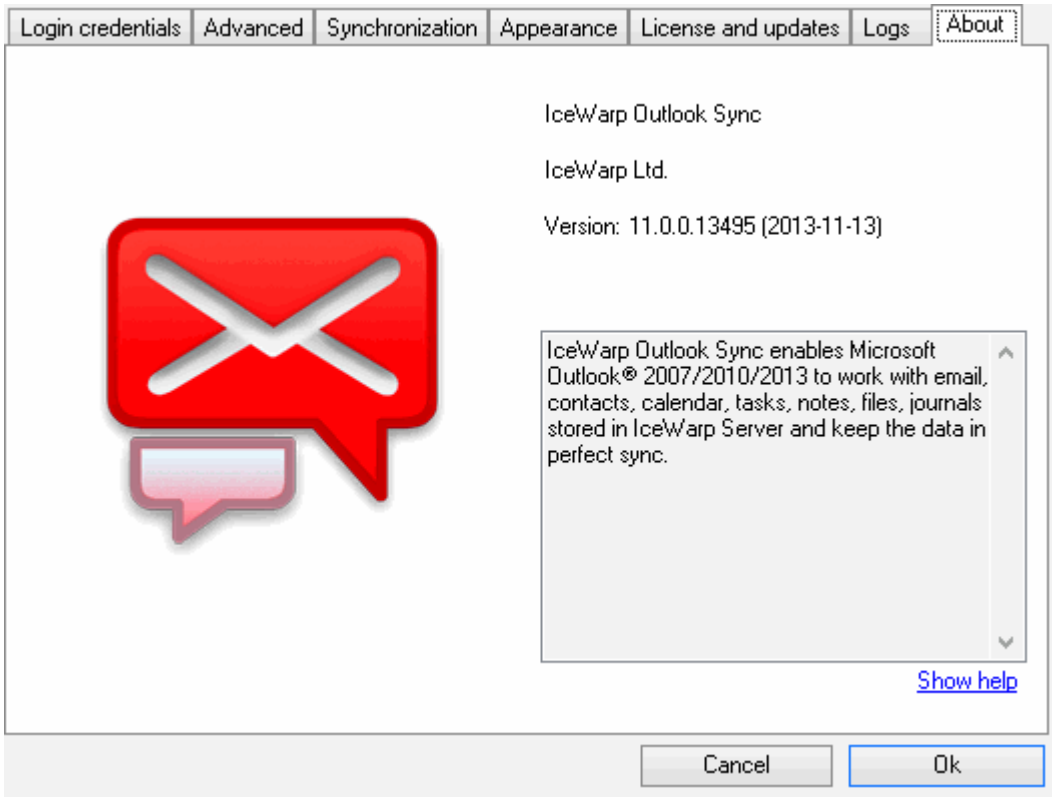
This tab allows you to manage logging.



Field	Description
Enable logs	Tick the box if you want to have logged IceWarp Outlook Sync traffic.
Level of logging	In the case IceWarp Outlook Sync works without problems, do not change the default setting. Otherwise, ask your administrator what level to set. In this case, do not use the ***Clear*** button.
Show log directory	Click the button to open a directory with log files. Here you can find daily files with traffic logs. E. g. **07-26-2011.txt**
Prepare logs from last two days	Clicking this button allows you to generate and save IceWarp Outlook Sync logs from last two days. In the case of problems, these logs are to be sent to IceWarp Technology (via your administrator).
Clear logs	Click the button to delete content of the current day log file.
Delete logs	Tick the box to enable automatic logs deletion.
Delete after specified days	Enter time period (in days) after what automatically generated logs will be deleted. This does **not** apply for logs generated by clicking the ***Prepare ...*** button.

About

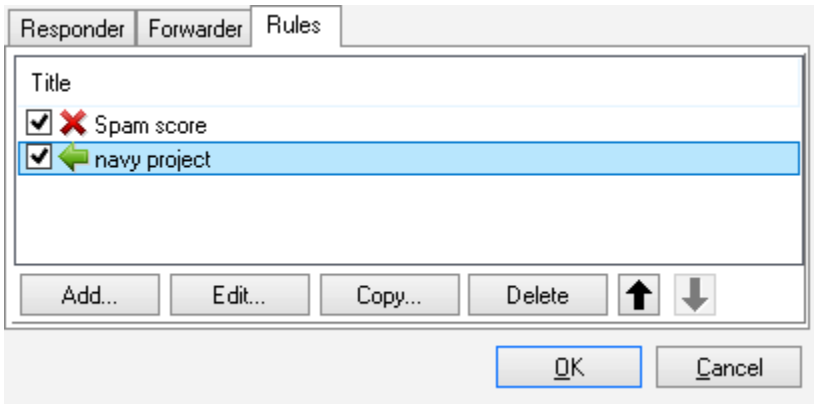
This tab informs you about IceWarp Outlook Sync itself and its version.



Rules

Click the button to open the **IceWarp Options** dialog – **Rules** tab. Here you can create and edit rules that can help you to catch spam and viruses as well as to sort messages and direct them to wished folders.

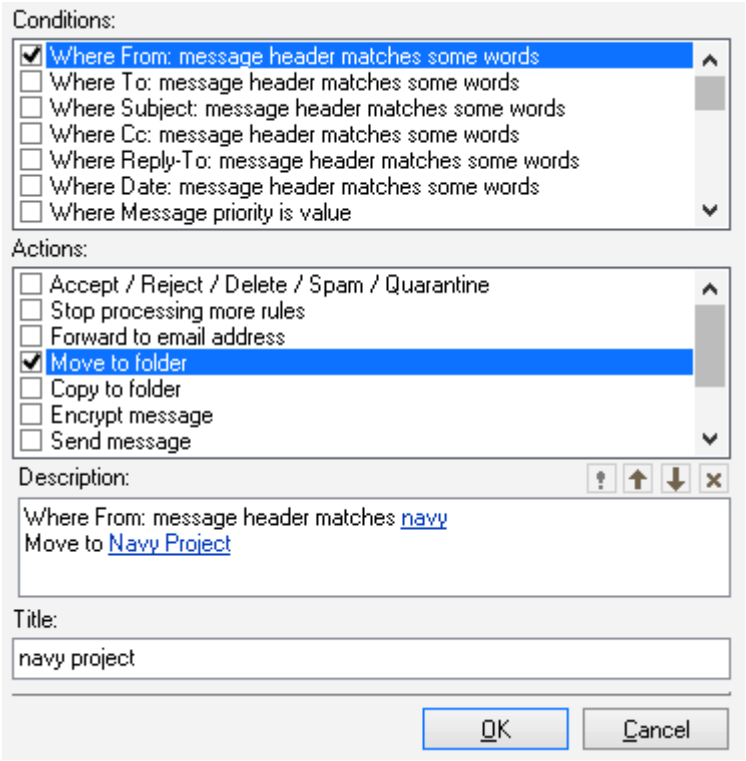
Figure 1 – IceWarp Options Dialog – Rules



Field	Description
Check boxes	Tick the box(es) next to the rule(s) that you want to have active.

Add	Click the button to add a new rule. The **Rule** dialog opens.
Edit	Click the button to modify an existing rule. The **Rule** dialog opens.
Copy	Select a rule and click this button to copy the rule. This is handy when you want to create a similar rule.
Delete	Click the button to delete the selected rule. Multiple rules can be selected for deletion by holding the ***Ctrl*** key and clicking multiple rules. A range of rules can be selected by clicking the first rule of the range and then clicking the last one while holding down the ***Shift*** key.
Up/down arrows	Click the appropriate arrow to move the selected rule up or down. Order of rules in the list affects the order how they are performed.

Figure 2 – Rule Dialog

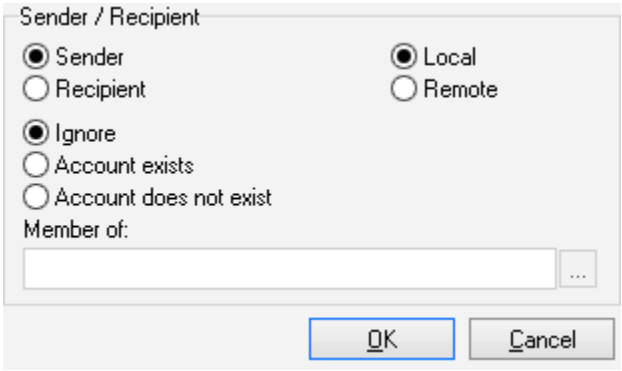

Conditions:
Where From: message header matches some words
Where To: message header matches some words
Where Subject: message header matches some words
Where Cc: message header matches some words
Where Reply-To: message header matches some words
Where Date: message header matches some words
Where Message priority is value
Actions:
Accept / Reject / Delete / Spam / Quarantine
Stop processing more rules
Forward to email address
Move to folder
Copy to folder
Encrypt message
Send message
Description:
Where From: message header matches navy
Move to Navy Project
Title:
navy project
OK
Cancel

Field	Description
Conditions	In this area, you can select the properties of the message that you wish to perform some test on. ▪ Multiple conditions can be tested by ticking multiple boxes. ▪ The same condition can be added multiple times by double clicking the condition when it is checked.
Actions	In this area, you select the action(s) that you want to perform on the message if the rule evaluates as true. ▪ Multiple actions can be selected by ticking multiple boxes.
Logic buttons	The buttons below the Actions block are used to add logic to the rule ▪ The exclamation mark will negate (NOT) the condition you are currently modifying. ▪ The up and down arrows will move the conditions up and down within the rule. ▪ The X button will delete the current condition. We recommend experimentation with these buttons to familiarize yourself with their function.

Description	This will show the rule you are building or modifying and will change dynamically as you select or de-select conditions and actions. *NOTE: Areas of the rules that can be modified are highlighted in this block and clicking them opens a further dialog box to allow you to define your test.*
Title	The name of the rule – for identification purposes.

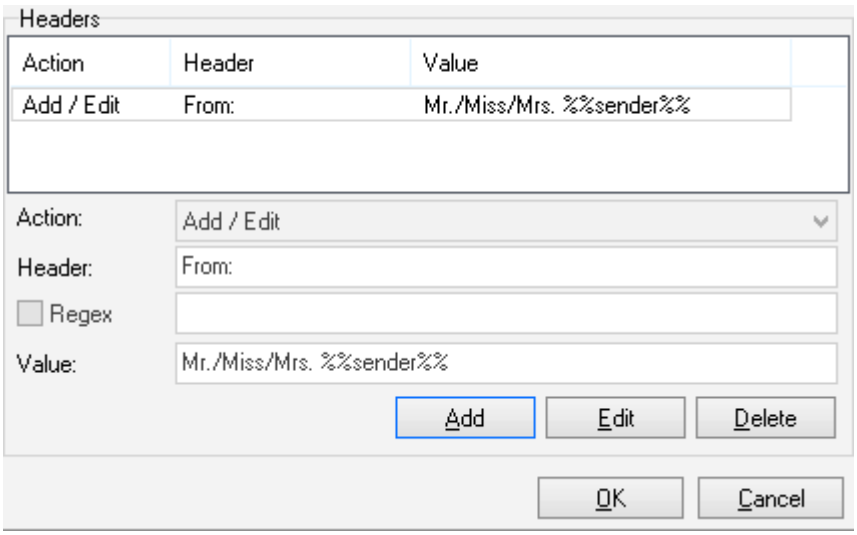
The following table details individual conditions and actions.

Condition	Description
Where From: message header matches some words	Checks the ***From:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where To: message header matches some words	Checks the ***To:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Subject: message header matches some words	Checks the ***Subject:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Cc: message header matches some words	Checks the ***Cc:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Reply-To: message header matches some words	Checks the ***Reply-To:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Date: message header matches some words	Checks the ***Date:*** header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Message priority is value	Checks the priority of a message. In the rule description, click the **Normal** link to select a priority.
Where Message is spam	Checks if the message has been marked as spam.
Where Message is size	Checks the message size. Click the ***0 kB*** link to select the message size criteria. Select ***Greater*** or ***Lower*** and specify its size (in kB).
Where Message body matches some words	Checks the message body for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Custom message header matches some words	Checks the ***Custom*** message header for a string condition. In the rule description, click the **some words** link to create the string condition (explained below). *NOTE: This rule has an unusual format for the string condition!* Format: ***<header>:<string condition>*** where ***<header>*** is the name of your custom header ***<string condition>*** is the string condition to test for. Example: ***MyHeader:jim;bob;john*** Would check the "MyHeader" header for any of the strings "jim", "bob" or "john".
Where Any message header matches some words	Checks all headers for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).

Where Attachment name matches some words	Checks the attachment name for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where message contains attachment	Checks whether the message has an attachment.
Where Sender matches some words	Checks the sender for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Recipient matches some words	Checks the recipient for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where sender/recipient is local/remote	Checks the location of the sender or recipient. In the rule description click on **local/remote** to open the following dialog: **Figure 3 – Sender/Recipient Dialog**  **Sender/Recipient** Select whether you want to check the the sender or recipient address. **Local / Remote** Select whether you want whether the chosen address is a local account or a remote one. **Ignore / Account exists / Account does not exist** Select whether you want to check whether the account exists, does not exist, or ignore this check. *Only available for local accounts.* **Member of:** Checks whether the account belongs to a particular domain, group, mailing list, etc. Press the '...' button to open the **Select Item** dialog. *Only available for local accounts that you check the existence or non-existence of.*
Where Sender's IP address matches some words	Checks the remote IP address for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where rDNS (PTR) matches some words	Checks the rDNS (PTR) record for a string condition. In the rule description, click the **some words** link to create the string condition (explained below).
Where Sender's IP address is trusted	Checks whether the Senders IP address is in the trusted list.
Where Spam score is value	In the rule description, click the **0.0** link to define a greater than or less than value to check the spam score against.
Where SMTP AUTH	Checks whether this message was delivered using an SMTP authorized connection.
Where Local time meets	Checks whether a message meets time criteria defined in the **Time Criteria** dialog.

criteria	
All messages	A special condition that evaluates TRUE for all messages – use with care!

String Testing	Description
	Clicking the **some words** link (in a new condition) or the string itself (in a condition already defined) will open the **String Condition** dialog box. There are four options available in the dialog: The ***Function*** drop-down box offers six options for the string test, the option chosen effects the content required in the **String** text-box
Contains list of strings (semi-colon separated)	Populate the **String** box with a list of strings to test for. Separate items using semicolons.
Matches (RegEx)	Populate the **String** box with a regular expression.
Starts with	Looks for the string specified in the **String** box at the start of the tested condition.
Ends with	Looks for the string specified in the **String** box at the end of the tested condition.
Equals	Tests whether the tested condition is ***exactly*** equal to the string specified in the **String** box.
Contains a value from a file or pattern	The **String** box should contain the path to a text file containing a list of strings you wish to test for. Press the "..." button to open a file dialog to navigate to a file where you can specify strings, one per line.
Match case	Check this box to take string case into account.
Match whole word only	Check this box to perform a standard "whole word" check against the string.
Actions	Description
	The following actions are available when a condition is evaluated TRUE. Multiple actions can be selected by checking multiple boxes. Selecting an action will add the action to the ***Description*** area. For some actions you can click the text in the description to define the action further. Details follow:
Reject/Accept/Delete/Spam /Quarantine	Adds an action to reject (default) the message. Click the **Reject** link in the ***Description*** area to select ***Reject, Accept, Delete*** or mark the message as ***Spam***.
Stop processing more rules	Stops any further rules from being processed, if the rule connected with this action is evaluated as TRUE.
Forward to email address	Forwards the message to an email address. Click the email address link in the ***Description*** area to specify the email address. *You can also send an instant message or an sms using this option:* *sms – use sms:<number> e.g. sms:0123456789* *IM – use xmpp:<jabberid> e.g. bruce@icewarpdemo.com*
Move to folder	Moves the message to a folder. Click the **folder** link in the ***Description*** area to select the folder to move to.

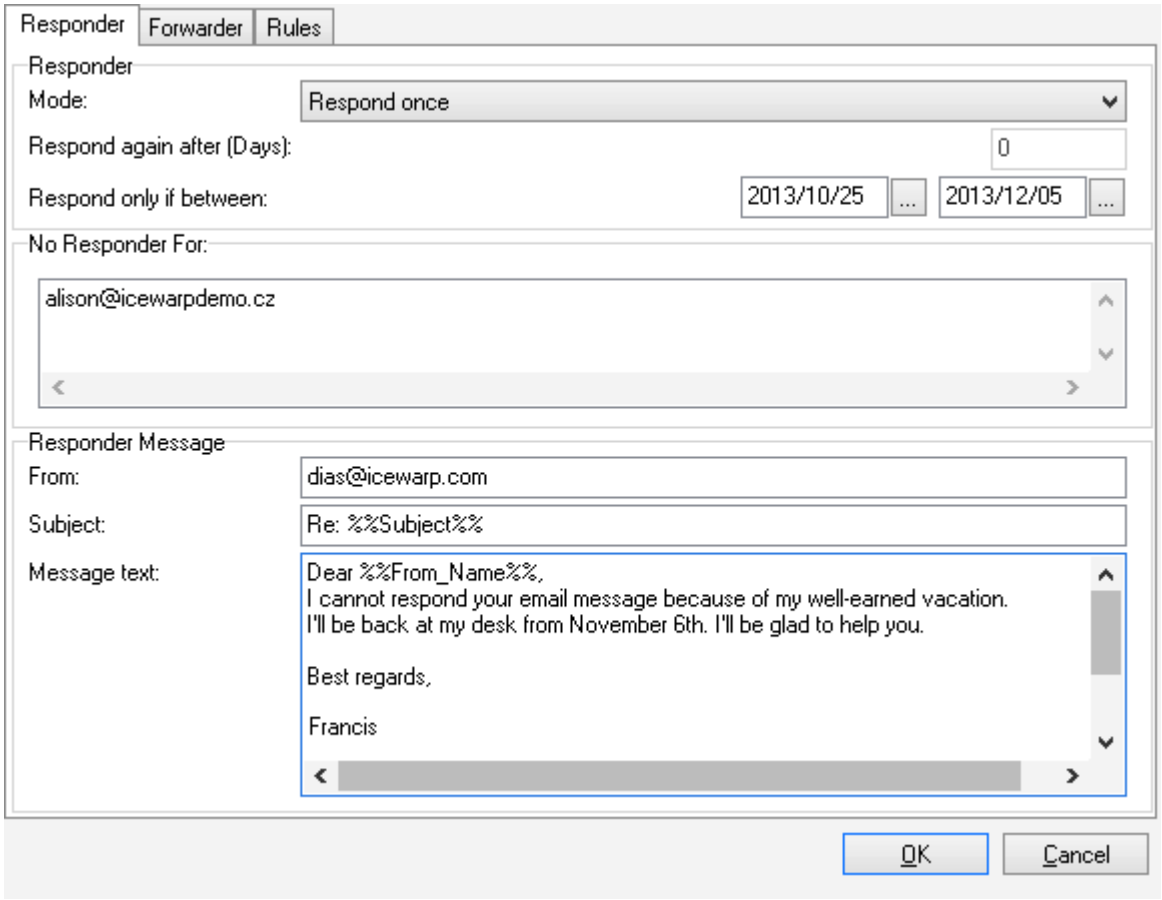
	Although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to. *You can have email delivered to a specific mailbox folder by specifying **%%Extension%%** as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists.* Example: A message sent to ***john:%%Important%%@icewarpdemo.com*** will be stored in the ***Important*** folder. *Note the colon used to separate the user's alias from the folder name.*
Copy to folder	Copy the message to a folder. Click the **folder** link in the ***Description*** area to select the folder to copy to. *NOTE: Although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to.*
Encrypt message	Check this option to have the message encrypted. *NOTE: For this option to work there must be a copy of the user's public certificate located in a file called cert.pem in the user's mailbox folder. The message will be encrypted using this certificate and then can only be decrypted by the user using his private key in his email client.*
Send message	Sends a message. Click the **message** link in the ***Description*** area to open a dialog to define the message. You can define ***To, From*** and ***Subject*** fields, the message text (or a file to retrieve the text from), the type of message (text, HTML, or message with an attachment) and whether the message is email, an instant message, or both.
Edit message header	Select this option to add, edit or delete a message header. Click the ***header*** link to open the **Edit Message Headers** dialog. **Figure 4 – Edit Message Header Dialog**  Click ***Add*** to add a new rule. Select an already defined rule and click ***Edit*** or ***Delete*** to modify or remove a rule. In the ***Action*** drop-down you should select whether this rule will add/edit a header or delete it. In the ***Header*** field you should specify the header you want to change/add – remember that

	the last header name character have to be a colon. You can also add your own named headers e.g. ***MyHeader:*** The first rule shown in the screenshot above modifies the From header - it adds the string "[URGENT]" to the begining of the header. Note the use of the IceWarp Server system variable ***%%from%%*** here, which is the value of the original From header. Any system variable can be used. The second rule simply deletes the ***From*** header.
Set message priority to value	Select this option to have the priority of the message changed. Click the ***Normal*** link to select the priority to be assigned.
Set message flags	Select this option to set a message flag. Click the ***flags*** to set the flag(s) you wish.

Responder

Click this button to open the **IceWarp Options** dialog – **Responder** tab. Here you can set how email messages will be replied during your absence.

Figure 1 – IceWarp Options Dialog – Responder



Field	Description
Mode	Select one of modes: ▪ **Disabled** – use this mode when you are at your desk – hard-working – or you do not want emails to be responded.

	▪ **Respond always** – select this mode if you want every email message to be responded. ▪ **Respond once** – select this mode if you want every sender (email address) to be responded only once. ▪ **Respond again after a period** – select this mode if you want a response to the same sender to be sent after a period specified in the ***Respond again after (Days)*** field.
Respond again after (Days)	Select the ***Respond again after a period*** mode and fill in the appropriate period to this field. The message defined here will be sent to the same sender after this period. (Provided that this sender will send a new email.)
Respond only if between	Use the "..." buttons to specify a period when the message will be sent.
No Responder For	Enter email addresses of users that are to be excluded from these responses.
From	Fill in your email address.
Subject	Specify a response subject. It is possible to use the ***%%Subject%%*** variable. This will copy the original subject. See the figure above.
Message text	Word your response here. It is possible to use server variables within the message text. E. g. the ***%%From_Name%%*** one will copy the sender's name (see the figure above).

Bind Profile

This option is only accessible when IceWarp Outlook Sync is installed and the profile currently selected in MS Outlook is not bond to it.

This situation can also occur when you delete the account that was originally connected with IceWarp Outlook Sync during its installation. Another possibility is that you have installed IceWarp Outlook Sync using the command line with the ***--noprofile*** parameter. (For more information on this installation type, refer to the **Advanced IceWarp Outlook Sync Background** chapter.)

BE AWARE: Only accounts that use the POP3 protocol as the default one can be bound with IceWarp Outlook Sync profile.

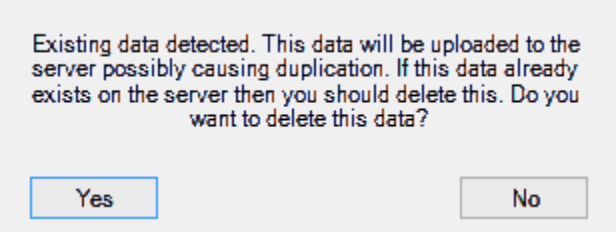
How to Use

1. Launch MS Outlook. In the **Choose Profile** dialog, select the appropriate profile that you want to bind with IceWarp Outlook Sync.

   Click the ***OK*** button.

2. On the Add-Ins tab, click the ***Bind this profile with server account*** button. The **Settings** dialog opens. Fill in all needed fields – see the **Settings** chapter.

3. During the first MS Outlook launch after IceWarp Outlook Sync installation, you may be presented with the **Initial Synchronization** dialog.


Existing data detected. This data will be uploaded to the server possibly causing duplication. If this data already exists on the server then you should delete this. Do you want to delete this data?
Yes
No

If your local Outlook ***.pst*** file includes any data (emails, contacts, etc.) – it probably does – and you want to keep them, click ***No***.

This can cause duplication of some items (not necessarily).

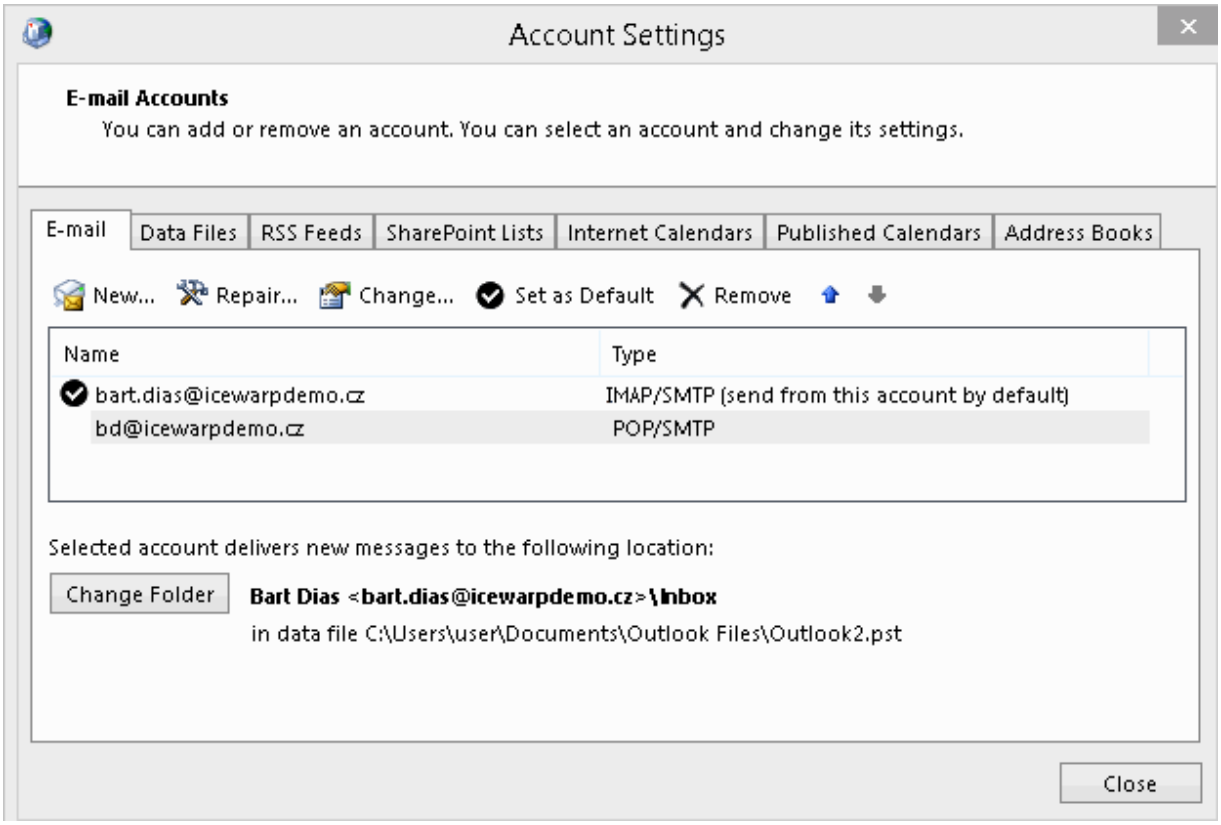
If you want to delete all previous data, click ***Yes***.

Non POP3 Account Binding Scenario

You may face the situation when you are using a non-POP3 account and you want to bind it with IceWarp Outlook Sync profile without a groupware data loss. This is also possible:

1. Within the existing profile (that includes your non-POP3 account), create a new "dummy" POP3 account and set it as a default one for this profile – select this account and click the ***Set as Default*** button.

Figure 1 – Account Settings Dialog – Set as Default



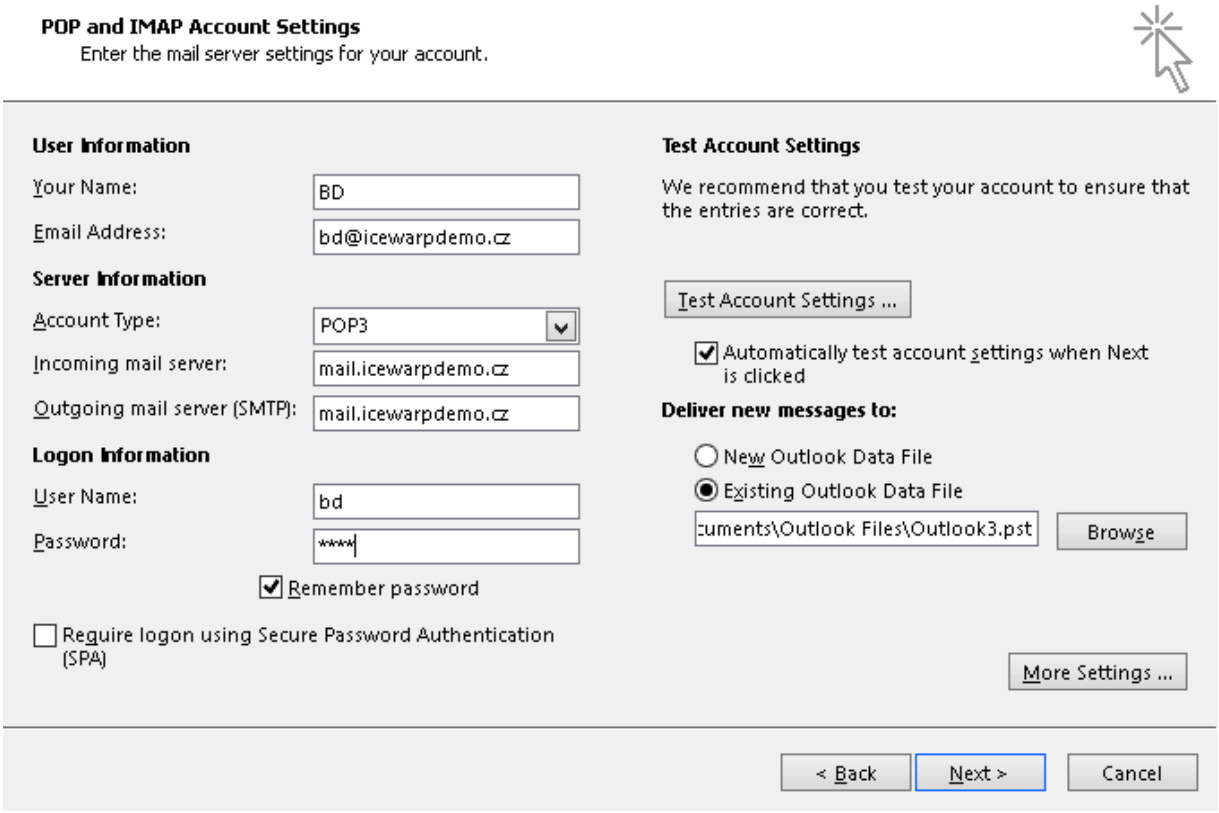
In MS Outlook 2007

IMAP account emails are stored on your server – no need to synchronize them. For groupware items (Contacts, Events, etc.), both accounts will use the same local Personal Folders. Later binding will synchronize them all to the server. Just click ***No*** when the **Initial Synchronization** dialog is shown (see step 3 of the **Bind Profile** chapter).

In MS Outlook 2010

When creating this dummy POP3 account, select the ***Existing Outlook Data File*** option, click the ***Browse*** button and select the appropriate ***pst*** file (**[profile_name].pst**). Groupware items (Contacts, Events, etc.) of both accounts are in this file and will be synchronized to the server. Just click ***No*** when the **Initial Synchronization** dialog is shown (see step 3 of the **Bind Profile** chapter).

Figure 2 – Add New Account – Existing Outlook Data File



In MS Outlook 2013

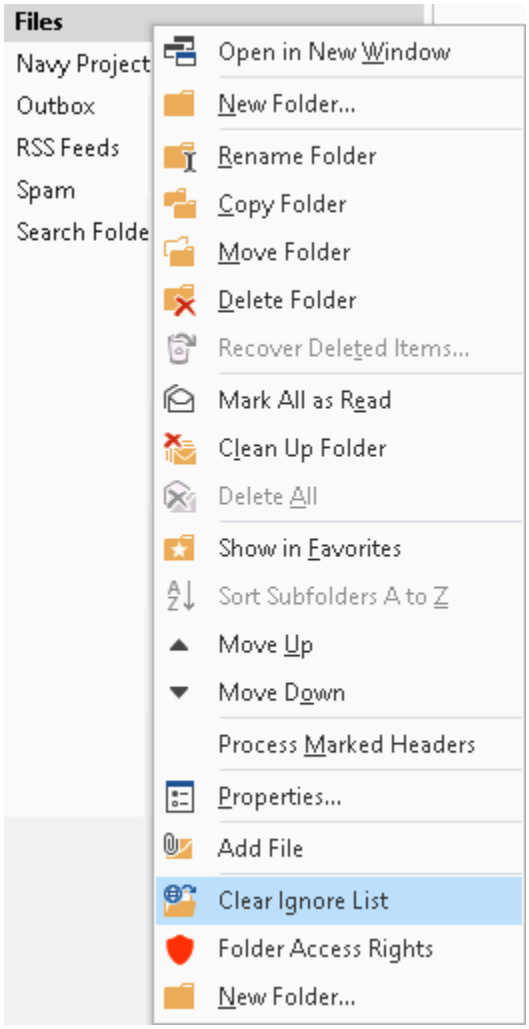
Workflow is similar to the one described in the previous paragraph. When creating this dummy POP3 account, select the *Manual setup or additional server types* option and click *Next*, select *POP or IMAP* and click *Next*, and continue with selecting the *Existing Outlook Data File* option as described in the previous paragraph.

2. Install IceWarp Outlook Sync without creating a profile. This is possible using command line installation with the ***--noprofile*** parameter – see the **Advanced IceWarp Outlook Sync Background** chapter – **Command Prompt Installations** section.

3. Perform binding of this POP3 account as described in the **Bind Profile** chapter.

Miscellaneous

Clean Ignore List



Sometimes, item download from a server to your email client can fail. When download fails three times, this item is included into an ignore list. Your email client does not attempt to download these items (emails, invitations, etc.).

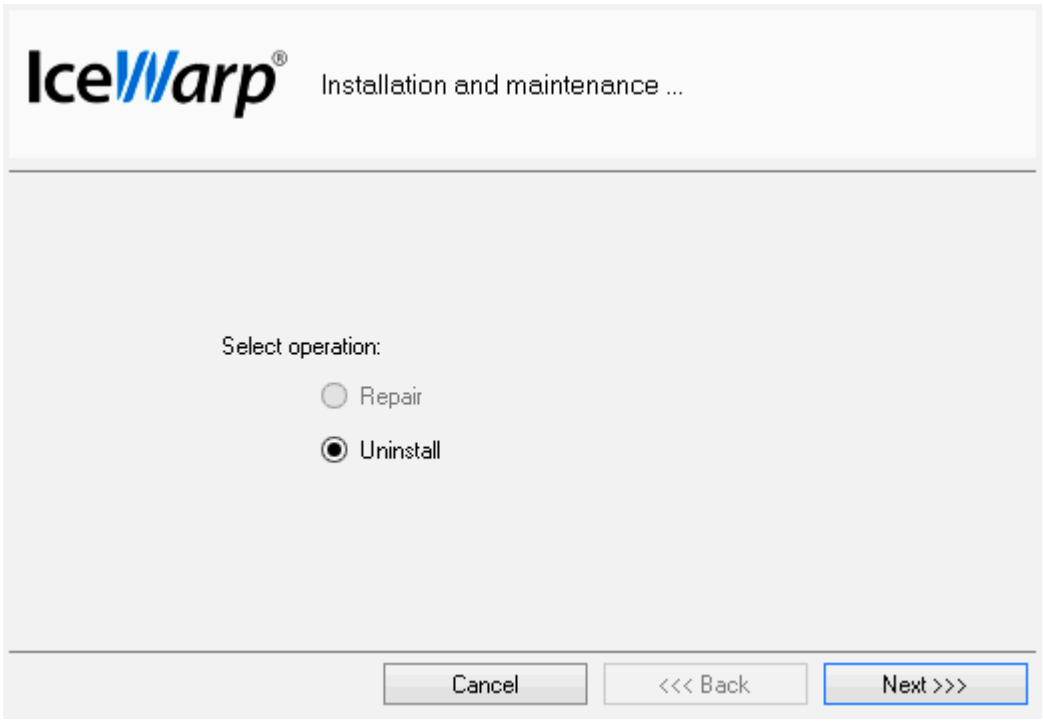
After some time, the problem with this item(s) can be solved. In this case, you may want to download missing items. Select the appropriate folder, right-click its name and select ***Clear Ignore List***. Missing items are downloaded.

Uninstallation

To uninstall IceWarp Outlook Sync, follow these steps:

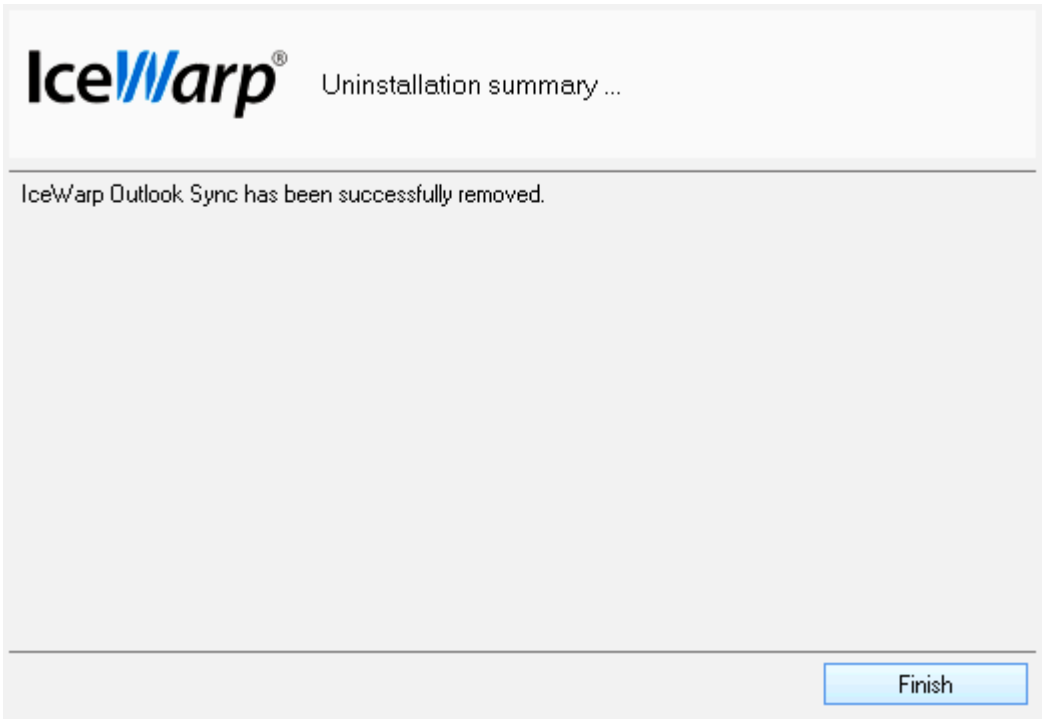
1. If running, close MS Outlook and launch the IceWarp Outlook Sync installer. It will detect IceWarp Outlook Sync is installed and switch to the uninstallation mode.
2. On the **Installation and maintenance** screen, select the ***Uninstall*** option and click the ***Next*** button.

Figure 1 – Installation and Maintenance Screen



3. On the **Uninstall summary** screen, review an uninstallation message and click the ***Finish*** button to close the wizard.

Figure 2 – Uninstall Summary Screen



Advanced IceWarp Outlook Sync Background

About

IceWarp Outlook Sync is based on a classical POP3/SMTP account. The SMTP account is set to use an existing IceWarp Server, whilst the POP3 account is set to be inactive. Therefore IceWarp Outlook Sync does not deal with sending emails at all. So digital signatures, encoding, invitation sending, etc. are handled by MS Outlook itself.

POP3 server is set to 127.0.0.1, port of 5110. IceWarp Outlook Sync listens on this port and simulates zero activity here. MS Outlook connects to this port from time to time and asks for new emails. IceWarp Outlook Sync always answers that there are not any new emails.

When performing synchronizations, IceWarp Outlook Sync connects to IceWarp Server using its own protocol to download/upload/update individual items.

It is recommended to create a "connector/sync" profile during IceWarp Outlook Sync installation – all necessary values are set within this process. The account created within this profile is the POP3/SMTP type one.

Mass Installations

It is recommended administrators to use the **.msi** file to perform remote mass installations (together with Active Directory Group Policy, a batch file or a third party tool). This installer sets all needed parameters – it is not necessary to set them manually.

Command Prompt Installations

It is also possible to run installation using Command Prompt. Use the ***outlook-sync.exe*** command with the following parameters:

Parameter	Description
--silent	installer will not show any interface, implies the ***--noprofile*** argument
--debug	installs debug version of Redemption, settings persist for update
--uninstall	installer uninstalls IW Outlook Sync from the machine, recommended with the ***--silent*** argument
--nodebug	installs release version of Redemption, settings persist for update
--log	installer produces installation logs to a file
Use with care	
--noprofile	installer will not ask for profile details and will not create a new profile
--noprofman	installer will not install a profile manager, use only if you are experiencing troubles with permission granting

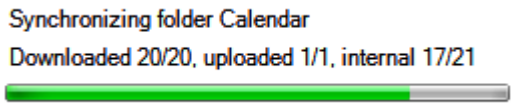
Example: ***outlook-sync.exe --silent***

NOTE: Redemption is a third party library for access to MS Outlook items and their properties.

Synchronization Progress Window

After Outlook Sync launch, its folders are synchronized with your server. In the case higher numbers of new items are synchronized, you may face a progress message window.

Figure 1 – Part of Progress Message



Meaning of numbers is as follows:

Downloaded X/Y: ***Y*** is the number of messages in the synchronization queue, waiting to be downloaded from the server, ***X*** is the number of currently downloaded messages (IceWarp Server to IceWarp Outlook Sync).

Uploaded X/Y: ***Y*** is the number of messages in Outlook, waiting to be appended to the server, ***X*** is the number of currently appended messages (IceWarp Outlook Sync to IceWarp Server).

Internal X/Y: ***Y*** is the number of messages already downloaded from the server and waiting to be imported to Outlook, ***X*** is the number of currently imported messages (IceWarp Outlook Sync to Outlook).